

PCTA Trail Skills College Curriculum  
Instructor Planning Guide

## Course 304. Crew Leadership: Managing Volunteers

For students with moderate to extensive trail building experience who want to lead trail crews and work parties. Not a construction techniques class; this is about effective leadership. Students will have classroom and field work in the following topics: work day responsibilities, risk assessment and safety, tool safety and tool talk, leadership and team building, practical experience leading volunteers.

---

### STUDENT SKILL OUTCOMES:

- Understanding of safety protocols and appropriate paperwork
- Learn different leadership and learning styles
- How to teach key concepts to a variety of volunteers
- How to thank and recognize volunteers
- Accurate reporting of work

### TRAIL MAXIM:

“Those who lead best, lead least.” “Be safe, have fun, get some work done.” “The best place to store a hard hat is on your head.” “Develop and enjoy the mixed curse of trail eyes. You’ll never see trails the same way again.”

### TOOLS NEEDED PER 8 STUDENTS:

Will depend entirely on the project site, though it is advisable to let participants choose, check, keep track of and maintain tools to give that practical experience.

### WORK SITE REQUIREMENTS:

This section is designed to be half classroom style instruction and half field-based practical experience.

### HANDOUTS:

- Project Paperwork Summary
- Volunteer Application
- Trailhead Communications Plan (TCP)
- Volunteer Sign-In Sheet
- Emergency Action Plan (EAP)
- Tailgate Safety Session & Tool Checklist (TSS)
- Job Hazard Analysis (JHA) (one or more)
- Project Report Form
- Volunteer Injury Packet

- Motivational Characteristics handout

### KEY CONCEPTS:

- 1) Pre-project Preparation:
  - Job Hazard Analysis (JHA)
  - Emergency Action Plan (EAP)
  - Trailhead Communications Plan (TCP)
- 2) Work Day Management:
  - At the trailhead
    - Welcome
    - Tailgate Safety Session (TSS)
    - Personal Protective Equipment (PPE)
    - Tool/Safety Talk:
      - C-Carrying
      - U-Use
      - S-Storing
      - S-Safety
  - At the work site:
    - Walk & Talk
    - Establish work groups
    - Teaching **“Trail Eyes”** to volunteers
    - Correcting mistakes
    - Contingency planning
    - The final 10%
  - Post-Project Duties
    - Tools and gear
    - Submit reports
    - Volunteer Follow-up
  - Volunteer Injuries
  - Using Vertex radios
- 3) The Softer Side of Leadership
  - Understanding and recognizing different motivational types
  - Understanding different learning styles
  - Being an effective listener
  - Performing conflict resolution
  - Assessing your crew
  - Building group dynamics

## BACKGROUND

The Pacific Crest National Scenic Trail exists largely in part because of the continued and growing support of volunteers. Each year the volunteer program grows and more individuals and groups are working to maintain the trail in a variety of ways year round.

The value of this work is immeasurable and the potential for further growth is endless. Volunteers are available and once they have a positive experience, they are exponentially more likely to return for future projects. The Crew Leader is responsible for shaping these people's experiences, introducing them to the world of trails and ensuring that they return for many more adventures and continue this successful effort.

Remember that every minute a volunteer is out on the trail is a gift, treat their time as such.

### A One-day vs. a Multi-day Project

This training is written as if a Crew Leader were guiding a one-day volunteer project. However much of the curriculum is applicable to and necessary for a multi-day project. There are obviously more logistics in planning a multi-day project, topics such as setting up a base camp and cooking for a crew in the field will be developed as separate courses in the Trails Skills College Curriculum.

### Pre-project Preparation

Note: All forms mentioned in this class are available on the PCTA web site under "Volunteer Resources." Use the Project Paperwork Summary as a guide.

#### Two to six months before the project:

- Prepare a clear project outline.
- Recruit and follow-up with volunteers.
- Meet with any land managers or PCTA staff to review your plans and/or the worksite. Make sure you've scouted the project beforehand and understand the scope of work and any site specific concerns.

#### One week before the project:

- Gather necessary tools, radios and equipment (BEFORE leaving for the project, inspect tools for sharpness, loose heads, cracked handles.)
- Make sure your first aid kit is up to speed and includes a copy of the Volunteer Injury Packet.
- Complete/Review and print:
  - Volunteer Sign-in Sheet
  - Emergency Action Plan (EAP)
  - Trailhead Communication Plan (TCP)
    - Send TCP to dispatch, agency partners and PCTA staff.
  - Job Hazard Analysis (JHA) for all applicable tasks
  - Tailgate Safety Session & Tool Checklist
- Gather and review volunteer profiles/medical information sheets
- Make extra copies of any necessary forms
- E-mail or call volunteers with directions, weather forecast, etc.

**Figure 1. Example of an informational e-mail to volunteers attending a project.**

*I'm delighted you're planning to participate in the PCTA's Echo Lake project on Saturday, September 19!*

*I will be your crew leader for the project, my cell phone number is 916-243-9923. Please plan to meet at Echo Lake's upper parking lot at 9:00 am.*

*Driving Directions (map attached):*

*From Hwy. 50 turn on to Johnson Pass Road (turn for Echo Lake/Echo Portal/Berkeley Camp); turn left on Echo Summit Road which is alternately called Echo Lakes Road. The road will narrow, continue following it to the large parking lot marked on the attached map. If you go all the way to the marina parking, please turn around and park in the upper parking lot. There will be signs up that say "Volunteer Trail Crew."*

*Please wear appropriate work clothes including long pants and sturdy closed-toed shoes. Please bring work gloves, sunblock, lunch, and at least two liters of water. The forecast for Saturday is a high is 78 and sunny.*

*If this is your first time volunteering for a trail project, you might want to watch this 10 minute video on volunteering on a trail crew: [http://pcta.org/videos/vol\\_for\\_trail\\_maint\\_320x240.wmv](http://pcta.org/videos/vol_for_trail_maint_320x240.wmv)*

*If you have any additional questions, please let me know. I look forward to seeing you on Saturday morning!*  
*~ Jennifer*

**One to two days before the project:**

- Check weather forecast
- Purchase food and/or snacks
- Let someone know when you plan to be in/out of the project
- Get ready to have fun!

**Structuring the Work Day**

Though each project is unique, establishing a basic structure helps to provide a consistent and successful approach on all trips. Careful planning, knowledge and expertise will ensure a safe and pleasant experience for volunteers.

**Before participants arrive:**

- Arrive at least 30-45 minutes early. If volunteers arrive early, engage them in the preparation process; it helps the Crew Leader and allows them to begin to feel necessary.
- Set-up directional signs at confusing junctions and turns, and to reassure volunteers they are heading to the right place. (Contact your local PCTA staff person for signs.)
- Set out tools, PPE and other materials.
- Have coffee, water and/or snacks ready if appropriate (particularly good for early morning starts).
- Prepare paperwork for volunteer signatures.

**When participants arrive:**

- Welcome volunteers and thank them for coming; make it a point to engage in conversation with each person and find out something about them, especially helpful to discover what motivated each individual to come to the project, where they heard about the volunteer project and what they expect out of the day. This doesn't have to be formal, simply casual, engaging conversation.
- Answer any questions; provide participants with PPE.
- Begin circulating the Volunteer Sign-in Sheet, making sure to note travel time (not mileage).
- It is a good practice to have volunteers put their names on their hard hats with masking tape and a Sharpie. This makes it easier for everyone to remember each other's names and to find your hard hat after lunch.

**Assistant Crew Leader(s):** It's a good idea to have an Assistant Crew Leader or two depending on your group size. If you find yourself at the Trailhead without an Assistant, ask the most experienced volunteer if they would like to assist you for the day. Give them specific instructions and expectations for their role.

**Timeliness:** Be sure to start at the scheduled time or within several minutes. It's only fair to those who have arrived on time and it sets the atmosphere of an organized project. If you know you are waiting on volunteers to arrive, save the Tool/Safety Talk for last. While you cannot encourage tardiness, also be understanding that unforeseen events can and do occur. If you are expecting people and they don't arrive, try calling them before you head to the worksite. If you can't contact the volunteer, leave a note at the trailhead or on a car with directions, bring paperwork, an extra tool and PPE to the work site in case they do show up late.

**Introductions and orientation:** Again thank everyone for coming. Introduce yourself and any staff on the project. It sets volunteers minds at ease to know that they are in the hands of someone experienced and knowledgeable. Next, introduce anyone notable (notable volunteers, agency partners, etc.) and give recognition in the group. This not only recognizes any "trail celebrities" but also allows newcomers to know who to direct questions to. For example: "Bill has done over 100 volunteer projects with us and received the XYZ award in 2005" or "Sue is joining us from ABC ranger district of the XYZ Forest Service. Thanks Sue for coming out." Then provide an opportunity for each individual to introduce themselves to the group. Encourage volunteers to say their name, where they're from, and to share any relevant trail experience they have had. This is also a great opportunity to ask volunteers to share something fun about themselves. It's a great opportunity for people to begin to find commonalities and opens up the lines of communication. It's not always easy meeting a group of new people so

structured introductions force people to become comfortable. Even a group who knows each other well can always find out new things about one another. Perhaps their favorite hike, their last wilderness adventure or something as simple as their one luxury item they bring to the woods. You will be covering a lot of heavy material following this, so keep introductions light and fun.

**Crew Leader Tip:** While listening to intros, you may be able to gather valuable information. For example: If John has come from the Bay area to the high Sierras for a project, he may not be acclimatized at this elevation. This is something you can note and observe throughout the day.

**PCTA and the crucial role of volunteers:** Briefly explain the overall mission of the PCTA, your specific volunteer group and thank any members attending for their support. Remind volunteers of the importance of their work and highlight notable volunteer accomplishments especially any significant projects in the area/region that you know of.

**Tailgate Safety Session (MOST IMPORTANT PART OF YOUR DAY!):** Use the Tailgate Safety Session Checklist to make sure you cover all the important topics during this talk. In this session you will cover general safety concerns and site-specific hazards. Safety is the first and foremost priority of any volunteer project. NOTHING we do on the trail is worth putting yourself or others in danger. Familiarize yourself with all paperwork prior to the project. Check the PCTA's Project Paperwork Summary to remember how to handle each form. Be sure to cover the following:

- **Overview of work:** Provide your group with an honest, brief, yet complete, overview of the day's work. Lay out the goals of the project and set expectations. Be sure to cover hike distance, weather forecast and trail conditions. Also, provide an idea of when the group will meet up for breaks/lunch and what time you expect to finish the day.
- **Job Hazard Analysis (JHA):** These documents explain the hazards associated with the different tasks performed during trail maintenance and rehabilitation as well as what actions to take to avoid these hazards. There are separate documents for each of the following: general trail work, crosscut saws, chain saws, packing with stock, rigging with grip hoists, and using rock drills. These documents are crucial and required.

An effective way to cover the job hazards and mitigation is to have each volunteer tell the group a hazard and what to do to prevent it. You as crew leader can use the JHA as a check off form as volunteers cover hazards. Cover any hazards not addresses by volunteers. Some crew leaders email the appropriate JHAs to volunteers before the project so they have time to read and review the document.

Each volunteer is required to sign the JHA(s) before leaving the trailhead.

- **Emergency Action Plan (EAP) and First Aid:** The EAP is designed to have crucial roles delegated in advance of an accident or serious injury. Ask the group who has medical training and what level; assign that person with the highest level of training as the "First Aid Lead." If not the First Aid Lead, designate the Crew Leader as the "Situation Manager" and designate someone with relevant experience to be the back-up should something happen to you. Make sure everyone knows who is carrying the first aid kit which should contain all volunteer's medical information and the PCTA's Volunteer Injury Instruction packet. Emphasize the importance of informing the Crew Leader of any injuries sustained throughout the day, no matter how small. Ask the group if anyone has several allergies that the First Aid Leader should be aware of and if anyone is carrying an EPI pen.
- **Trailhead Communications Plan (TCP):** This form lists all the location-specific information needed in case of an emergency evacuation. There should be two copies at the project, one with the Communications Lead and one to be sent with the injured person.
- **Personal Protective Equipment (PPE):** Trail work is part of a long tradition of woods work that dates to the 1930s era of the Civilian Conservation Corps (CCC) and to earlier logging. Because



workers face many hazards, they wear standard safety gear known as PPE. While the hazards of trail work are often not as great, sometimes they are, so we get to wear the same gear. Different tasks require different PPE, required PPE is listed in the task-specific JHA.

Government agencies require their working trail crews to wear at all times: hard hat, long pants, long-sleeved shirt, sturdy leather boots, and gloves. This is for a variety of reasons, most importantly to provide at least one layer of protection between sharp tools, rocks, and trees and the fragile human body. The PCTA's partner agencies, the U.S. Forest Service, Bureau of Land Management and National Park Service, extend workers compensation coverage to all volunteers (including those of PCTA), as long as they follow safety guidelines. (For a detailed overview of this coverage, read the PCTA's "Volunteer Injury Instructions" available at the PCTA website under "Volunteer Resources" then "Injury Info Packet".) It is also critical that PCTA volunteers follow all prudent safety procedures to protect our organization from liability lawsuits. All crew leaders should feel empowered to enforce the PPE requirements on the JHA and remember that safety is the #1 priority.

While it may be safe to do some trail work tasks without a given item of PPE, circumstances can change in a moment, then requiring a particular PPE item that might not be at hand. Thus the safest practice, by far, is to wear all standard PPE at all times. While this may lead to some grumbling, whenever you catch yourself saying, "Why the heck am I wearing this \_\_\_\_?" use that as a reminder to shift your focus to a more important question, "How can I carry out this task even safer?" As for the most common complaint, if the weather is hot, simply wear a light weight shirt and pants, and wear a moist bandana under the hard hat.

Making sure that you have appropriate PPE on hand for your volunteers is a crucial step. Bring extra gloves, hard hats and safety glasses for all participants. You may want to have different sizes on hand, especially when working with youth groups. Poor fitting PPE can be more of a hazard than a safety precaution.

- **Other topics to touch on:** The importance of breaks: many volunteers want to work hard (which is great!) but often need to be reminded to pace themselves
  - Hydration: Adults often need to be reminded to drink water, especially on not so hot days
  - Bathroom: Discuss where to use the facilities and encourage Leave No Trace practices
  - Sunscreen: The sun can be incredibly damaging and sunburn can incapacitate the best of us. Share sunscreen or encourage protection from the sun.
  - Communication: Not only communicating needs or injuries to crew leaders but also letting someone know if you're leaving the worksite, announcing when you're passing by someone swinging a tool, alerting others before you slide or roll a rock downhill and alerting other volunteers to passing hikers and equestrians.
  - Altitude: As much of our work is done at high altitudes, take precaution if volunteers are not acclimatized, familiarize them with signs and symptoms of altitude sickness and again encourage them to inform you of any symptoms.

**Tool Talk:** Each tool's function and use is highlighted in other Trails Skills College courses. BEFORE the project inspect the tools for sharpness, loose heads and cracked handles. Flag and separate any broken or questionable tools. An effective way to lead a tool talk is to have each volunteer pick one tool and tell the group what it does or what they suspect it might do. You can fill in any other relevant information as they go. This not only alleviates the Crew Leader from talking for awhile but also engages the volunteers and allows them to demonstrate their knowledge.

In your tool talk, remember the acronym "CUSS":

C-Carrying

- Wear gloves when handling tools.
- Use safety sheaths/scabbards when appropriate.
- Carry tools at your side, not on your shoulder (Exceptions: rock bars, chain saws with scabbards).
- Carry tools (or the heavier/more dangerous tool if you have multiple) on the downhill side of the trail to easily throw out of your way should you fall.

- Carry tools with their most dangerous side facing down. This is a difficult decision with some tools, talk with volunteers to determine which is the most dangerous side of tools like the McLeod and the pick mattock.
- Maintain a safe distance between people when hiking with tools. It is everyone's individual responsibility to monitor the person in front of them.

#### U-Use

- Know your tools and their proper use; use the proper tool for the proper job.
- Check handles of tools for splits and heads for security, do not use a damaged tool.
- Your body is your most important tool. Engage proper body mechanics when using a tool or lifting/carrying materials. When proper body mechanics are used, you increase the longevity of your ability to work.
- In general, tools do not need to be swung above your head. Short swings from shoulder height are effective. Putting a tool above your head not only puts additional strain on your body but in the case of tools with removable heads, it increases your risk of injury by the tool as the head could slip off. In the event that you do require an overhead swing be sure to announce this to those around you and clear the area of brush that could catch the tool.
- Let gravity work for you, your downswing with a tool should not require much effort.
- When swinging a tool, as you pull the tool up, slide your one hand up the handle of the tool. As the tool begins its downswing, slide your hand down the handle to meet your other hand at the base. This helps guide the tool and give you more control.
- Establish communication signals for lifting or otherwise moving rocks, logs, etc. A useful technique to employ is for one person to be the designated caller for the group. Instead of asking "Is everyone ready?" the caller should ask "Is anyone not ready?" This eliminates the confusion of multiple people answering at once. The caller should then instruct the group to roll/move on their count of three. Moving logs and rocks is the cause of many injuries in the field. Be especially aware of strains to back and knees using improper body mechanics or moving too heavy materials. Also note hand placement and body placement when moving materials. Slide or roll rocks away from yourself, downhill and NEVER put your hand under rocks or logs that are propped up by tools or other workers.
- When moving materials downhill, be sure that the area is clear of hikers or other volunteers. Announce loudly that you are moving something to alert to the group and receive confirmation that you are heard. Things can get away from you quickly and unexpectedly. Most work situations do not involve closing the trail off to the public so know who's where and in the event of moving extremely dangerous material you may want to consider having someone stationed up and down trail from the worksite to prevent anyone from inadvertently crossing into the danger zone.
- Use the "10-foot Rule" (aka "Dime," "Circle of Death," or "Blood Bubble") when swinging tools. Each crew member should have a 10 foot "bubble" of space between them and the closest person to them. This can be easily demonstrated by holding a tool, extending your arm and making a circle around you. Some projects, like rock work, require that people work closer together. In these cases, you must simply utilize awareness and good communication.
- When passing by someone working on the trail be sure to announce "coming by" or "passing through" and remember that this is a request for passage and not a demand. Be sure the individual hears and acknowledges your request before stepping into their "dime".
- Be aware of your footing, especially in wet slippery conditions or on a steep slope.

#### S-Storing

- Utilize the Tools Checklist to keep track of how many of each tool is brought to the worksite and empower one of the volunteers to be the "Tool Manager," ensuring that the group leaves with everything they came with. Marking your tools with brightly colored paint or distinct patterns can not only help distinguish ownership but also can be a great assistance when looking for a lost tool in the brush along the trail.
- Store tools off the trail on the uphill side with the handles pointed toward the trail and the sharp ends uphill always, even if you're setting it down just for a minute.
- Note special storage for individual tools. For example, shovels should be pointed sharp side down to prevent the famous cartoon moment of someone stepping on the tool and the handle whacking them in the face. Rock bars should be secured on the uphill side so they do not escape and act as

javelins to innocent passersby.

- When caching tools overnight or for long periods of time, be sure to find a discreet location off the trail (that can be easily located by you) and protect the tools from the elements by wrapping them in a tarp or otherwise covering them.

## S-Safety

- Use **Go/No Go** to determine if trail workers should proceed with a task or walk away to insure their safety. Crew leaders sometimes exercise such judgement for a group, but it is essential that every trail worker develop these critical thinking skills for times when they work on their own. Such analysis evaluates all the hazards present and balances them against the skills they have. *For a decision to proceed, a trail worker should be able to predict with a high confidence level, exactly what will happen during the task (such as which way logs will move in a series of cuts in a pile up). If they are unable to predict the outcome with confidence they should walk away.* The most important thing every trail worker needs to know is that it is totally OK, and they show the very best judgement, when they walk away from danger without completing a task. Of course, it is essential to report the need for a more skilled crew to complete the hazardous work.
- Ask people if they have any specific safety concerns and encourage them to take an active part in promoting safety especially if they observe unsafe conditions and practices around them.
- If you are leading a multi-day project, conduct a refresher tool and safety talk each. Ask volunteers if they noticed any unsafe safety or tool practices the previous day.
- PPE, PPE, PPE; you cannot emphasize the importance of this enough.
- Use skill and technique over force and power.
- Be alert and aware at all times, take frequent breaks. Mental well being is equally as important as physical.
- Trade tools periodically throughout the day if possible. Repetitive stress causes a lot of injuries. Everyone has varying degrees of coordination. It takes some people longer than others to become comfortable with a new tool. Challenge people to broaden their horizons but allow them to use what they feel comfortable with and spend as much time as necessary time training individuals how to be comfortable and safe with new tools.
- Remember even individuals with years of experience can have bad habits. Safety should be regularly discussed with every group on every project, regardless of experience level. It's a good reminder to keep safety fresh in everyone's minds.

**Warm-up Stretching:** Some Crew Leaders prefer to do warm-up stretches at the trailhead and others halfway through the hike or upon arrival to the worksite. Whenever you choose to do this, it is an integral part of your work day. This can be done as a group-led exercise or individually. Stretching can also take place simultaneously with other discussions, but not when relaying incredibly crucial information that could be ignored. In groups of younger people it can be fun to employ theme stretches or games to warm up. Stretching can be fun and enjoyable in addition to being immensely productive in preparing the body for a day's work. Trail work employs significant muscle use that differs from what most people's bodies are used to, so be sure to stress loosening muscles in body parts like the hands, which can cramp up easily after a day of tool use. Continuing to stretch throughout the day and at the end of the day will ease impact on your body as well. Remember even the fittest of athletes stretch before working their bodies!

## At the Work Site

**Walk & Talk:** You can make the choice here whether to start work from the trailhead (or that direction) and work out or to begin at the furthest point and work back towards the trailhead. Starting at the trailhead allows you to cross back over your work at the end of the day. Starting at the furthest point out allows you to be closer to your vehicles and lessens the end of the day hike. While there are benefits to both structures and much debate over the better method, it is largely a matter of personal preference. A particular project may better lend itself to one structure over another.

Regardless of how you structure lining out the work, upon arriving at the work site with the entire group, go over the day's work. Point out specific projects and if necessary, use this as an opportunity to discuss key trail terms and site specific concerns. This will give participants a visual understanding of

the work and allow them to think about what specifically they are interested in spending their day doing. Cover each project clearly, thoroughly and concisely. Allow time for questions and return to any larger, more detailed projects for further explanation once work begins. It is much easier to answer questions upfront than to correct mistakes later.

If this is a multi-day project, go over the previous day's accomplishments and note any changes that need to be made. Mistakes and necessary corrections can be noted to the group tactfully but are better discussed with individuals. No one sets out to do bad work and it's the Crew Leader to ensure people are given the necessary tools and knowledge to do good work.

Not all necessary information can be conveyed in this initial "Walk and Talk." The Crew Leader must be active THROUGHOUT the day continually providing guidance and instruction. Make use of teachable moments, there are many things you cannot prepare for and the best learning takes place when it occurs naturally in working through the process of a task. In addition to teachable moments in work skills, provide or encourage others to point out things such as interesting flora and fauna or a notable geological feature. The more people understand about the environment around them, the more interested they'll be in spending time exploring and protecting it. Often volunteers can be great resources of local knowledge, so encourage an atmosphere where sharing of these tidbits is welcomed and appreciated.

**Establish Work Groups:** Most often a volunteer crew will be divided into smaller work teams. Find out what volunteers are most interested in doing. This is their project and as much as possible, without sacrificing safety or quality, you want to ensure that people's needs and desires are being met. Volunteers should be able to walk away at the end of the day feeling a sense of accomplishment at a job well done. You can often pair a new volunteer with a more experienced one or empower a frequent volunteer to share their skills and knowledge with others in this way. You as the crew leader do not have to do all the teaching. Chances are you have a wealth of resources in your volunteer group, so use them wisely.

Line out the work for each group and get them started on their projects. Make each group aware of where the others will be working, and when and where everyone will meet for breaks or lunch.

**Lunch Chat:** It is important to regroup for breaks or lunch as this is as much a social activity as anything else for many volunteers. After volunteers have finished their lunches and are relaxing, use this time to have a "lunch chat." Since this is one of the few times during the day when you will have all the volunteers together, remind them about safety on the project, provide an update on the progress of the work groups, remind volunteers of the plan for the remainder of the day, and again thank them for volunteering.

**Teaching "Trail Eyes":** While the Crew Leader can simply point out features of the trail that need work, it is highly beneficial to begin to foster independence in your volunteers by teaching them to see the trail from a trail maintainer's perspective, or with their "trail eyes".

As with any new endeavor, a volunteer needs to develop a heightened awareness of the trails they travel. Frequently new volunteers have been trail users for some time, they have well developed habits of awareness that are, quite naturally, focused on the scenery, their horse, etc., rather than on drain dips, berm, waterbars and tread erosion. They were quite busy enjoying themselves without paying attention to the trail, other than obvious hazards.

The need to develop a heightened awareness of trail maintenance issues is essential, quite simply, because if new volunteers fail to notice the work needing to be done, they won't stop to do it. This initial lack of awareness can't be underestimated; I have seen many new volunteers instinctively duck under branches along a trail, without noticing they needed to be cut out. The ability to see a nearly full drain dip really does take well developed "trail eyes."

There are many ways to help volunteers develop trail eyes, but a common approach asks one volunteers at a time to walk in front of the group identifying trail problems or well functioning features. A



little humor never hurts, encouraging them to “put on their beautiful **trail eyes**”.

**Correcting Volunteer’s Work:** Again, remember that no volunteer sets out to do bad work. It is the Crew Leader’s responsibility to ensure that volunteers are given the tools and guidance necessary to perform quality work and to monitor work throughout the day. Everyone has different styles, so talk to the volunteer about what they were setting out to do and what their vision was. Perhaps they know something you don’t or are have the right thought process but have executed their ideas inappropriately. Working through mistakes can be the best learning tool out there. Everyone makes mistakes, even the most seasoned volunteers, yet it’s still best to be careful to engage tact and to not publicly shame volunteers for their lack of knowledge or experience.

Many veteran trail volunteers have also picked up bad habits along the line somewhere. To an extent, confronting these situations you have to employ the “pick your battles” mentality. However, it is always a tricky battle encouraging someone to change old habits. It is prudent to consider whether the work being done is a detriment to safety or function of the trail or whether it is a stylistic difference. Choose your words carefully and attempt to make suggestions such as “Maybe you could consider...” or “I try to look at it like this...”

In the end, the Crew Leader is in charge. Follow the trail specifications for the trail and consult resources as necessary. If a volunteer is doing something you are unsure of, you can always move them to a different project. Mistakes that are allowed to go too far can be very time consuming to fix and more importantly can quickly turn into hazards.

**Contingency Plans:** Sometimes things don’t go as planned. The most effective strategy in dealing with unforeseen circumstances is to develop a plan for how to handle situations before they arise.

Some situations to consider include:

- **Volunteer can’t do the work/make the hike to the worksite:** Try changing their duties. Find a project that they can accomplish happily and effectively. Can you find a project closer to the trailhead to put them and a few other folks on? Provide positive reinforcement on the tasks that they can do well. If a volunteer doesn’t want to work with tools, perhaps they could scout ahead on the trail, record work accomplished or head back to camp with the cook crew to start dinner.
- **Registered volunteer doesn’t arrive:** Attempt to make contact and see if there’s anything you can do to assist in their arrival without putting out the rest of the group. If you leave the meeting area without someone, be sure to leave a note with directions to the worksite and carry extra PPE and a toll with you, should that person arrive. If they do not arrive, be sure to note this to staff in your reporting.
- **Volunteer refuses to wear/use ppe:** (See PPE section above.) Remember that safety is the #1 priority and feel empowered to enforce the requirements on the JHA.
- **Volunteer wants to leave early:** Talk with them to learn the reason. Whatever the reason, be sure that they arrive at their vehicle safely. Have someone hike out with them if possible.
- **Inclement weather:** Keep everyone safe and happy. Make a prudent decision to leave the worksite should safety or well being be compromised. Make a solid assessment of your crew’s skill and experience level working in sub-optimal conditions. Know what gear your crew has to protect them from the elements and whether that is sufficient for the situation.
- **Asking a volunteer to leave:** Talk with them. Find out what it will take to make this a positive experience for them and the group. If all conflict resolution strategies fail, ask the volunteer to leave and escort them to the trailhead. People volunteer because it makes them happy and one problem volunteer can ruin the experience for a group. Be sure to send them home as only a last resort and if it does come to this, report it to a staff member.

**Crew Leader’s role throughout the day:** Crew Leaders take on their role in part due to passion for the trail, a love for getting dirty and doing quality work. However, when guiding volunteers in trail work, you have to find a balance of swinging tools and being a resource for others. Some people contend that the Crew Leader shouldn’t be working with tools at all. Others contend that you lead best by setting the example for the crew. Find the balance that works best for you. Whatever that balance may be, you have other goals to meet throughout the day.

You must:

- Keep people busy, engaged and interested.
- Provide varying tasks and meaningful work
- Make sure breaks occur and the schedule is adhered to.
- Watch for safety issues.
- Monitor environmental conditions.
- Monitor quality and consistency of work.
- Provide explanations and instruction to each work group.
- Utilize teachable moments.
- Talk with everyone, facilitate good communication.
- Hand out goodies and praise!
- Conduct ongoing assessment of each volunteer.
- Monitor progress of work and record accomplishments.

## Ending the Work Day

Before you start the hike back to the trailhead, assign an experienced volunteer to sweep the work areas along the trail for trash, gear or tools.

Ask the Tool Manager to pull out the Tools Checklist to see if volunteers have all the tools that were brought to the worksite to ensure that volunteers leave with everything they came with.

**The Final 10%:** End the work day strong! The final details are often what separate good work from excellent work. When users come onto the trail we want them to have no idea that a crew has just been in there doing work. Of course, it's great to show off your accomplishments and once you get your **"trail eyes"** you will always notice work done and need for work on a trail. However, there is a mystique surrounding trails and you can utilize some simple trail psychology and put those final polishing touches on the trail to cause people to think this fantastic path has just always been there. This may mean ensuring that cut brush is thrown inconspicuously off the trail and that cut branches are disguised with a little smudge of dirt or that you spend some time rehabilitating your lunch spot that you've used for the past week. Crew Leaders should allow time in the schedule for the final 10% of effort and motivate crews to take the time to leave the trail looking polished and spectacular.

Once you reach the trailhead or car, ask the Tool Manager to again pull out the Tools Checklist to see if all the tools are accounted for.

**Reviewing Accomplishments:** It is important for your own reporting to have an accurate and thorough understanding of the work completed. It is also rewarding for volunteers to understand the impact and scope of their accomplishments. "We built 800 feet of new trail" or "We installed 4 water bars" is significantly more concrete than "We did some trail work." Make sure to show praise and appreciation for a job well done.

**Closure:** Once back at the trailhead (on time of course!) be sure to thank volunteers yet again. Consider providing appropriate refreshments and/or snacks. This bonding time is crucial and oftentimes what draws people to return. Laughing, telling battle stories and highlighting accomplishments is often the highlight of many people's day. Use this time to hand out any materials you want to send the volunteers home with, share information about the next project and solicit feedback on the day.

If you are working on a multi-day project, this time of congregation is important daily, but be sure to allow ample time on the last day for closure activities.

**Feedback:** Getting on-site feedback from participants while the day's events are fresh in their mind can be incredibly productive. Some Crew Leaders favor informal discussion, while others prefer to use a structured debrief or a written form. A simple structured debrief is to ask each volunteer to share one positive, one negative and one thing they might change about their day. There are countless other debriefs a Crew Leader can utilize and you will have to decide based on what information you want

to gather. Bear in mind that there may be things someone isn't comfortable sharing in the group, so provide opportunity for them to share those thoughts later in a different format. This could be as easy as an anonymous survey to mail back or simply giving them your contact information. Having participants reflect on their experience is part of the experience for them as well as useful for you to know what works well or doesn't work for future projects.

Make sure everyone departs safely and do a final sweep of the area to ensure your group hasn't left anything behind!

## Post-Project Duties

**Tools and Gear:** Return any borrowed tools, radios, etc. to their rightful owners. Mark equipment that needs maintenance. Perform any necessary upkeep and maintenance on your own tools. You want to keep them in good shape for future use!

**Submit Reports:** Complete and send in the PCTA's Project Report Form and signed project paperwork: volunteer sign-in sheet, JHAs, and volunteer profile forms. (Refer to the Project Paperwork Summary.) Be sure that all participants are given credit for their hours and all accomplishments are noted. Also make notes of any work left incomplete, so future Crew Leaders, PCTA staff, and agency partners will know the status of work in an area. Be sure to send along any photos of your work as well!

**Follow-up:** It is a good practice to send an e-mail to the volunteers again thanking them for their work. You may want to include upcoming projects, a memorable story and if you have them, pictures. For many people, connecting via online groups is a way to carry on the social benefits gained from a project. The memories of a day's work can carry far beyond the project site. This type of ongoing community is also what gets folks coming back together on future projects. If you desire further feedback than that gained on the project site, this may be a useful venue for that as well.

## Volunteer Injuries

What if a volunteer is injured on the project? A volunteer working on the PCT is officially a volunteer of the USFS, BLM or NPS, and is entitled to certain protections when safety requirements and current volunteer agreements are in place. These volunteer protections are especially important in case of an injury involving a PCT volunteer. It is important that volunteers, volunteer leaders, and agency partners know what to do in case of an injury involving a PCT volunteer.

**VIF/VIP:** There are two separate laws which authorize the U.S. Forest Service and National Park Service agencies to work with volunteers and provide them certain protections. VIF (Volunteers in Forests) is the Volunteers in the National Forests Act of 1972 which applies to the USFS. VIP (Volunteers in Parks) is the Volunteers in the National Parks Act of 1969 which applies to NPS.

**BLM Volunteers:** The authority for the volunteer program in the BLM is found in the Federal Land Policy and Management Act of 1976 (FLPMA), as amended, including amendment by Public Law 980540 of 1984 (BLM Volunteers for the Public Lands Statue), the Federal Tort Claims Act, and Provisions of the United States Code which authorizes compensation for work injuries.

In all three federal agencies, volunteers are considered to be federal employees for purposes of:

- 1) compensation for work-related injuries or illnesses under the Federal Employees Compensation Act (FECA), relating primarily to costs for medical care in case of injury or illness; and
- 2) protection from tort claims, under the Federal Tort Claims Act, which may be filed by anyone who may claim to have sustained personal injury or property damage due to the actions of a volunteer; and
- 3) claims relating to damage or loss of personal property of the volunteer while performing volunteer service.

Volunteers are not considered to be federal employees for purposes of pay, benefits, retirement, or unemployment compensation.

**California State Parks Volunteers:** Volunteers working on the PCT in California State Parks are covered under the federal agency that the easement is granted to from California State Parks. This will be either the USFS or BLM.

During the Crew Leader course, cover the details of the Volunteer Injury Packet and Instruction sheet. For more information on volunteer work-related illnesses, tort protections, or personal property losses, contact the PCTA's Trail Operations Manager.

## Using Vertex Radios and Working with Dispatch

**Prior to your work party:** You may find it helpful to contact your local agency dispatch via email or telephone, to let them know you are a PCTA volunteer trail crew going on a project and pass on your itinerary. Besides, it's a nice touch to have some personal contact and chat with the folks who are looking out for you. You can also use your cell phone to check in and out with them. The Dispatch operating hours change seasonally; make sure you know their operating hours so you can call them with your out of service message before they close for the day.

### Basic Operation:

- Turn the Radio on using the OFF-VOL dial on the top of the handheld. This also adjusts your listening volume.
- To speak, listen to make sure there is no other traffic on the radio, then press and hold the largest button on the handheld's left side while speaking into the grated speaker area on the front.  
*Remember to press and hold for two seconds before starting to talk – otherwise the beginning of your transmission will be cut off by the repeater delay.*
- As volunteers, we usually communicate in one of two ways depending on which channel we have selected. One way is using the repeater system where many people, such as Dispatch, monitor our conversation. The other way is communicating within the work party as walkie talkies. If someone else is near the crew and is also tuned to the work channel, they might also hear the conversation.

### Channels and Repeaters:

- Vertex radios operate on a repeater system, meaning that transmissions pass between your radio and a nearby repeater tower, which in turn relays them to the rest of the system.
- You will need to tune your radio to send and receive transmissions from the correct repeater – usually the one nearest to you or with the best signal for your location. Note that some repeater locations have multiple frequencies and antennas that cover different areas.
- To change channels on your radio, turn the dial next to the OFF-VOL dial on top of the radio. The small marker on the radio points to the channel the radio is tuned to, and the name of that channel appears on the LCD display on the front of the radio.
- To determine the correct channel to turn to, ask your PCTA Regional Rep or USFS partner before heading out.
- If necessary, you can confirm that you are successfully transmitting and receiving on a given channel by briefly pressing and releasing the talk button on your radio. If you are successfully "hitting" the repeater, you will hear a moment of static and a click from your radio. You will also see a red light (while transmitting), followed by a green light (from the repeater signal) on the radio. Don't do this too much or Dispatch will think there is someone trying to reach them.

### Basic Steps for Transmitting or Responding to a Radio Call:

- Conversations start by the caller saying the last name of the person (or Dispatch entity) she is calling, her own last name, and the name of the channel or repeater she is using on. For example: "Hawley, this is Owen on Hickman" or "Cobb this is Queen on Work."
- Then, the person receiving the call repeats her caller's name, then their own name: "Queen, Cobb" or "Queen this is Cobb go ahead"
- Then the conversation takes place in an efficient, brief manner. Remember that every radio for hundreds of miles can hear you: "I am leaving the trailhead and am heading back to Zigzag"
- Assuming the receiver hears the transmission, they confirm as much: "I copy that. I'll meet you"



there.”

- Finally, the caller signs off with their name, followed by the receiver: “Cobb clear” or “Queen”
- You should always call Dispatch with an “In Service” message at the start of your work party. Call Dispatch with an “Out of Service” when you are done for the day. You should also let them know if you deviate from your itinerary. Conversations with Dispatch follow the same format, with “Dispatch” used for the dispatcher’s name. At the end of a conversation, the dispatcher might sign off with a time and a call number such as “KOE598, 0729”
- Dispatch may also ask you for a Township, Range, and Section number for the area you are referring to.

Example conversation at the beginning and end of the work party:

Listen to make sure the channel is clear

Kim Owen: “Columbia Dispatch, this is Owen on Hickman”

*Dispatch: “Owen this is Dispatch, go ahead”*

Kim Owen: “Owen plus 8 is in service at the Ramona Falls Trail head. We are a PCTA volunteer work crew headed to Ramona Falls today – and plan to return to the trail head by 1600.”

*Dispatch: “Copy that Owen do you have the coordinates for your work destination?”*

Kim Owen: “Affirmative Dispatch. We will be working at Township 3 South, Range 8 East, Section 12.”

*Dispatch: “Copy Owen, give a call when you are back at the trail head. KOE598 0828 clear.”*

Kim Owen: “Owen”

When you are back at the TH, call with an out of service message

Kim Owen: “Columbia Dispatch this is Owen on Hickman”

*Dispatch: “Owen this is Columbia, go ahead”*

Kim Owen: “Columbia, Owen plus 8 are out of service for the day at the Ramona Falls Trailhead.”

*Dispatch: “Copy Owen, have a good evening, KOE598 1605 clear.”*

Kim Owen: “Owen”

### Radio Storage:

- It’s okay for these radios and batteries to be left plugged in indefinitely to charge. If not left plugged in, it’s a good idea to plug them in overnight every six months so the battery does not discharge completely. Ditto for the spare batteries. Also, charging them below 50 degrees F will reduce their battery life.
- The Vertex radios are weather resistant, but not water proof. Please keep them out of the rain when possible.

## The Softer Side of Leadership

Much of a Crew Leader’s role is ensuring that quality work is done and that safe practices are observed. However, your job is largely people management. There are numerous “soft” skills that go into being an effective leader and facilitating positive group dynamics. You must understand volunteer’s motivation and learning styles, be an active and effective listener, know how to assess your volunteers, and possess skills for conflict resolution and building group dynamics.

**Understanding Motivational Types** (from OSI’s Crew Leadership For Trails): Researchers David McClelland and John Atkinson suggest that there are three different motivating characteristics in human behavior. Although they acknowledge that most individuals have a mix of all three types, one tends to dominate.

The three characteristic types identified are:

- **THE ACHIEVER:** This person is committed to accomplishing goals, welcomes a new challenge and looks for opportunities to test out new skills and improve performance.
- **THE AFFILIATOR:** This person values relationships, enjoys working with others and seeks out

opportunities to be helpful and supportive.

- **THE POWER PERSON:** This person seeks to influence people and events so that change is realized.

No one style is better than the other. In fact, most successful projects require a mix of styles to blend the work of a group. Teams that include a variety of styles benefit from the different perspectives people bring to the task. However, people with different styles prefer different types of supervision, recognition and job placement. It is helpful to determine the preferred style of a crew member in order to provide an effective match. Distribute and review the Motivational Characteristics handout and exercise from OSI's Crew Leadership for Trails, they describe characteristics of each motivational type and the kind of supervision that is most effective. (Motivational Characteristics are listed on the next three pages.)

**Learning Styles:** There are three primary learning styles to be aware of when teaching skills to a new group. Each person learns differently, so be sure to incorporate elements that will appeal to each learning style when presenting information. The three main learning styles are visual, auditory and kinesthetic. This is a very simplified breakdown of learning styles and much more extensive research is available.

- **Visual Learners:** Learn through seeing. These learners need to see the teacher's body language and facial expression to fully understand the content of a lesson. They tend to prefer sitting in front of the classroom and taking notes. They may think in pictures and learn best from visual displays including: diagrams, charts and hand-outs.
- **Auditory Learners:** Learn through listening. They learn best through verbal lectures, discussions, talking things through and listening to what others have to say. Auditory learners interpret the underlying meanings of speech through listening to tone of voice, pitch, speed and other nuances. Written information may have little meaning until it is heard. These learners often benefit from lecture and discussion.
- **Tactile/Kinesthetic Learners:** Learn through moving, doing and touching. These people learn best through a hands-on approach, actively exploring the physical world around them. They may find it hard to sit still for long periods and may become distracted by their need for activity and exploration. Their mantra is often "let me do it, then I'll understand."

**Being an Effective Listener** (from OSI's Crew Leadership For Trails): To be an effective listener, one must be an active listener. The most helpful thing to remember when listening is simple: stop talking. As a Crew Leader it is paramount to the success of volunteers that you are truly listening to your volunteers. Any number of things are liable to distract you, but simply listening to your volunteers can give you a lot of beneficial information about them and their attitudes on that particular day, how you can more effectively lead them and how their future as a volunteer will play out.

Positive Listening Techniques:

- Stop talking. You can't listen and talk at the same time.
- Lean forward and make eye contact.
- Be patient, allow the speaker time and ignore distractions.
- Empathize with the Crew Member.
- Hold your temper - anger displays more than words.
- Focus on the problem, not on the personality.
- Be open - consider the speaker's feelings and opinions.
- Demonstrate equality, not superiority.
- Maintain a problem-solving attitude.
- Show tolerance for ambiguity.
- Be aware of others in the group.

Negative Listening Techniques:

- Criticize or argue.
- Be confrontational.
- Act exasperated or walk away.
- Interrupt or be obstructive.
- Be a "yes man".

Questions & Phases that Prompt Communications:

# Motivational Characteristics: ACHIEVER

MOTIVATIONAL CHARACTERISTICS	DESCRIPTION	CONDITIONS OF SUPERVISION
<p><b>Achiever</b></p> <p><b>Goal:</b> Success in a situation which requires excellent or improved performance</p>	<p><b><u>Positive Attributes:</u></b></p> <p>Concern with excellence, personal best</p> <p>Sets moderate goals, takes risks</p> <p>Enjoys a level of moderate stress</p> <p>Restless/innovative</p> <p>Likes challenging work</p> <p>Likes to work alone</p> <p>Likes to overcome barriers</p> <p><b><u>Negative Attributes:</u></b></p> <p>Will sacrifice people to achieve goals</p> <p>May be insensitive</p> <p>Can be autocratic</p> <p>Gets bored quickly</p>	<p>Wants concrete feedback to improve performance</p> <p>Likes results-focused management</p> <p>Wants a boss who leaves him/her alone</p> <p>Likes to be challenged</p> <p>Enjoys time management and responds to goals, objectives and conceptual thinking</p> <p>Needs a well-delegated task</p> <p>Enjoys being consulted about decisions, planning</p>



# Motivational Characteristics: POWER

MOTIVATIONAL CHARACTERISTICS	DESCRIPTION	CONDITIONS OF SUPERVISION
<p><b>Power</b></p> <p><b>Goal:</b> To have an impact or influence on others; to bring about change.</p>	<p><b><u>Positive Attributes:</u></b></p> <p>Concern for reputation, position, respect</p> <p>Tries to shape opinion</p> <p>Wants to change things (e.g. Provide opportunities for the physically challenged)</p> <p>Combative, fighting spirit</p> <p>Verbally forceful</p> <p>Uses social power:</p> <ul style="list-style-type: none"> <li>• Exercises power to benefit others</li> <li>• I win – you win – (we win!)</li> <li>• Charismatic</li> <li>• Creates confidence in group to realize achievable goals</li> </ul> <p><b><u>Negative Attributes:</u></b></p> <p>Uses personal power</p> <ul style="list-style-type: none"> <li>• I'm in charge</li> <li>• I win – you lose – (we lose)</li> <li>• Group is dependent, submissive</li> <li>• Treats people indifferently</li> <li>• Autocratic</li> </ul>	<p>Likes clear cut policies and procedures</p> <p>Likes to know limits of authority</p> <p>Likes strong leadership</p> <p>Needs lots of personal freedom and respect</p> <p>Works well alone</p> <p>Tends to operate outside standard rules and regulations</p> <p>Likes to associate with other "power brokers"</p> <p>Needs to be included in decision making and planning</p>





# Motivational Characteristics: AFFILIATOR

MOTIVATIONAL CHARACTERISTICS	DESCRIPTION	CONDITIONS OF SUPERVISION
<b>Affiliator</b>  <b>Goal:</b> To be with others, to enjoy mutual friendships	<u><b>Positive Attributes:</b></u> Seeks out relationships  Likes to work with many people  Likes social activity for its own sake  Sensitive to feelings, needs and wants of others  Supports others in the achievement of their goals  Talks about feelings  <u><b>Negative Attributes:</b></u> Will sacrifice project goals to keep people happy  Concerned about personal popularity  Hates to discipline  Is crushed by criticism	Wants a concerned, caring supervisor  Enjoys long chats  Welcomes advice  Likes to be part of a team, pair, group  Needs help if situation is tense or unpleasant  Avoids conflict  May not report problems back to supervisor or may "dump" them back to supervisor



- Can you expand on that?
- What solutions/choices do you see?
- What needs to be done?
- How do you feel about that?
- How important is that to you?
- How do you plan to do it?
- I'm glad you brought that to my attention.
- What are your major concerns?
- How can I help?
- What is the best way to work it out?
- What do you think?
- How did you come to your decision?
- That is important. What solutions do you see?

**Conflict Resolution:** It would be nice to think that every volunteer project will be conflict-free. However, when a diverse group of individuals spend any length of time together, conflict can be inevitable. The key is preventing it when possible and handling it well should issues arise. Well-managed conflict can actually become a very positive learning experience. Conflict can arise from any number of issues ranging from differing belief systems to personality clashes to perception differences. Conflict can occur within an individual (intra-personal), between two people (interpersonal) or amongst a group (intra-group).

### **Tips for Effectively Managing Conflict:**

- Real issues driving many conflicts are rarely obvious.
- Separate the people involved in the conflict from the rest of the group for privacy unless it is a group issue.
- Clarify issues and find common ground.
- You are in charge of how you respond.
- Avoid pre-formed judgments.
- Solutions lie in building trust and open dialogue.
- A vision of success is required.

**Assessing Your Crew:** Assessing your crew is an ongoing process and many of these elements have already been discussed, however having a complete picture allows you to be proactive in your leadership and to ensure a positive experience.

Here are a few levels on which to remember to be regularly assessing your crew:

- **Expectation:** Remember, each person has different motivations for volunteering. The more of these expectations that can be fulfilled, the better the experience for the volunteer and the more likely they will return in the future
- **Skill:** Know your crew members skill sets and utilize them effectively.
- **Personalities:** Always a combination in every group! Allow people to shine as individuals and give them tasks that suit their personalities
- **Safety:** Personal safety, group safety and mental well being. While individuals can be responsible for their own safety, it is ultimately the crew leader's responsibility to monitor and assess all aspects to ensure that all safety procedures are being followed throughout the day.

**Recognizing Differences:** No group of volunteers will be entirely uniform. However, a comfortable atmosphere is important for all volunteers and it is the crew leader's responsibility to ensure that needs are being met and that all members of the group are comfortable both physically and emotionally.

- **Generational differences:** Recognize that some leadership methods may need to be adjusted depending on the age of your volunteers. What is effective for high school youth groups will not necessarily work for a group of retirees.
  - “Matures” born between 1909 and 1945. Driven by the ideals of duty and sacrifice. Often measure a work ethic on timeliness, productivity and not drawing attention to oneself.
  - “Baby Boomers” the first “Me” generation was born between 1946 and 1964. One of the largest generations in history, they dominate today's workplace with 80 million members. Their work ethic is measured in hours spent on the job. They are team oriented and consider relationship building skills as critical for success.
  - “Generation X” born between 1965 and 1979. Taught to question authority. Productivity on the job matters more than time on the job. They invest loyalty in people, not companies and have embraced a carpe diem attitude

- “New Millennials” born between 1980 and 2000. They have been coddled since birth, protected by their parents. They are technology gurus. They seek open, constant communication from the boss and seek personal fulfillment from their jobs, not necessarily financial security yet. They are torn between individuality and fitting in.
- **Gender differences:** Be cautious to not reinforce stereotypes and to create an atmosphere where men and women feel capable, respected and valued.
- **Background/Experience:** Inevitably, volunteers will have varying levels of experience and vastly different outdoor backgrounds. While one volunteer may be well versed in wild edibles, another may have never used the bathroom in the woods. Only ask people to take on what they are comfortable with and guide your leadership to accommodate everyone.

### **Building Group Dynamics:**

A group will naturally form its own dynamic over the course of their work together. You can facilitate this being a positive relationship in a number of ways.

- Talk with each person each day and encourage others to do the same.
- Facilitate games, riddles or any other activity that encourages people to have fun especially during break and lunch time! Adults love this too!
- Foster an atmosphere of respect.
- Bring the group back together for meals and at the end of the day-this is when development happens.
- Vary work teams as much as possible.
- Check in with your volunteers frequently.
- Involve the volunteers in as much of the decision making process as possible. Use consensus when possible to make sure that everyone's needs are being met.
- Model what you expect from others-both on and off the trail.
- LISTEN.
- Keep structure, limit unknowns.
- Have high but attainable expectations.
- Encourage leadership in others.

**Inspiring people, being a motivator:** Many veteran trail volunteers can list of a number of people, places and events that inspired them to pursue their passions on the trail. By maintaining a positive attitude and leading by example, you set the tone for inspiring your own volunteers. Motivating a group can be as simple as passing around candy during a long afternoon or as thoughtful as sharing a book with one of your volunteers. However you choose to motivate, know that you have the potential to inspire a lot of people. Often this extends beyond your volunteers crew. Hikers and trail users may pass by your group doing work and be motivated to volunteer in the future. (It's a good idea to carry a few brochures in your pack to pass out to trail users you encounter during the work day.) A campground host may learn for the first time of an active volunteer community in the area. So talk with folks, wear your most positive attitude and your brightest smile and you never know who you can influence!

### **TEACHING TIPS & TECHNIQUES:**

---

Though this section is designed to be half classroom and half field based, perhaps the easiest way to teach many of these skills is by giving participants practical experience leading so they feel comfortable before they hit the ground with a crew.

**JHAs, EAPs, and TCPs:** Have these on hand and let participants fill them out as though they were leading the day's project.

**Project Report Form:** Have students fill out a Project Report Form using the following scenario:  
 Eleven people traveled from the Bay Area to the Tahoe National Forest for a five-day hitch in a wilderness area. Brian used four pack stock to carry their gear the four miles to the worksite. John and Sally prepped the tools and equipment for two hours prior to the hitch. David was the camp cook for the entire hitch. Tuesday brought a rainstorm and the crew only worked until lunch. Amy left the project on Thursday morning due to a family emergency. The crew worked from

XYZ trailhead two miles north to road crossing 123. One mile of brush was cleared and a half-mile of tread work was done. Additionally, twelve waterbars, two check dams, and two 3x4 ft. rock retaining walls were constructed. Construction was begun on a ten-foot log turnpike, but the structure was left partially completed at the end of the hitch.

**Tailgate Safety Session:** Have students take turns being in charge of going through each component of the TSS. Have students provide feedback.

**Safety:** Again, use personal examples and solicit personal accounts from others. Fill out some mock volunteer profile forms with medical information that would be crucial for a Crew Leader to know to test their ability to notice. For example: an allergy to peanuts or bee stings, diabetes, anti-coagulating heart medications.

**Work Day:** Develop an example work project. Let the students formulate a work plan and assign volunteer work teams accordingly. Give the students a list of volunteer with “fake” skills and ask them how they would utilize them on the project. For example, let them know that one person has ten years of experience doing rock work and maybe that another is an EMT. Have participants take turns being the Crew Leader. You as the instructor can feel free to give them a difficult time and play the problem volunteer. Have fun with it!

**Contingency Plans:** Have students act out the various scenarios. Assign two students to act as crew leaders for each situation and discuss how they would handle it and develop a contingency plan.

**Working with Challenging Volunteer Situations:** Discuss the following scenarios and how to address the volunteer’s action(s). The list lessons are a place to start but the scenarios offer more than what is listed under lessons.

Scenario 1: Marlo is a 42 year old urban mom. Her outdoor experience is limited to the day hikes she takes twice a year with other moms from her kids school and the once a year camp trip her family takes to the KOA. Marlo recently heard of the volunteer opportunities with the PCTA and NWSA and has decided this would be a great way to give back to the trail and leave something for future generations. She’s excited about this opportunity. The group sets up camp first thing. Marlo picks a beautiful spot to set up her tent, 10 feet away from a creek. Before heading out to begin work on the trail, Marlo is ready for a mid-morning snack. She has an orange and offers to share it with everyone. She throws the peel under a nearby bush. The workday goes well and Marlo is really enjoying herself as she cuts brush. At the end of the day, everyone heads back to camp for dinner. The crew leader had notified Marlo that morning that she was on dinner duty (dinner duty includes dinner prep and clean up), however, Marlo disappears back to her tent and doesn’t come back until dinner is ready. The conversation over dinner is great and the food is delicious. When dinner is finished Marlo washes her dish and heads back to her tent.

Scenario 1 Lessons:

- LNT (tent location, orange peel)
- Approaching a volunteer when they have already been asked something

Scenario 2: Martin is 73 years old and claims to know every square inch of the section of trail you’re working on. He’s been living and working on the trail since before you could walk. As you head out to the worksite, you realize he moves slower than the rest of the group. As he begins to fall behind, he’s very adamant about the group going ahead. He knows where you’re going and he’ll catch up. Once everyone gets to the worksite and begins on the project, you realize he doesn’t have a hardhat on. You mention this to him but he refuses to wear it, he says they’re uncomfortable and he has never worn one before.

Scenario 2 Lessons:

- Role of sweeper; communication between separate groups
- Safety



Scenario 3: Your crew is working on a trail project, performing several tasks in close but safe proximity. You notice that two of your volunteers have taken tools and are working on a site outside your assigned zone. As far as you know, there is no work scheduled there. One of these volunteers, Jim, is new to your crew, but has let it be known that he has “a lot of experience and know-how.” The other, Paul, is in his first season of trail work, and strikes you as meek and mild mannered.

When you get a look at what they are doing, you discover that they are digging out a good rolling grade dip and appear to be replacing it with a high rock water bar. When a female team leader, Sandy, approaches Jim about their rogue work, Jim says, “Honey, this rolling grade dip is designed to allow bikes to maintain enough speed to really screw up the trail further downhill. Little girl, you don’t have the trail experience I have to know how this really needs to be fixed. Paul, keep finding rocks for that new water bar!”

**Scenario 3 Lessons:**

- Renegade volunteer performing unassigned work
- Lack of clear chain of command
- Inappropriate language

Scenario 4: Henry is 35 year old volunteer on your project. His volunteer profile says he’s an experienced backpacker and has more than 150 hours each year as a PCTA volunteer crew leader. Henry arrives early at the trailhead and because of his vast experience helps the team arrange gear for the pack in. He also adds several good points to the Tailgate Safety Session. The crew and volunteers hike nine miles, set up a spike camp and hikes two miles each day to and from the worksite with their tools. Hiking back to camp at the end of day three, Henry loses his footing, tripping and falling with his tool. Henry standings up, brushes himself off, says he’s fine, and keeps hiking back to camp. Throughout the evening and the next morning at breakfast you notice Henry is moving slowly and occasionally winces. The team leader checks in with Henry about his health. Henry says he’s fine and ready to work.

**Scenario 4 Lessons:**

- Need to assess medical conditions
- Need for volunteers to be honest

**Team Building Activity:**

**SCENARIO:** You and your team members are fleeing an area of dangerous volcanic activity. Suddenly your escape route is blocked by a river of lava, and the fire and destruction are closing in fast. You must all cross the lava to reach safety. Your team packed two pair of lava-proof work boots, but you must all cross simultaneously...Good luck!

**PURPOSE:** To develop group communication, cooperation, and problem solving. The scenario has many possible solutions and provides an opportunity for teammates to explore one-another’s strengths, weaknesses, and methods of problem solving.

**EXECUTION:** Teammates must all travel from Point A to Point B simultaneously with only four limbs touching the ground at any one time. From this basic premise the activity can be applied in several ways:

- **Race:** This is a speedier, higher energy version of the activity. All teams are presented with the scenario and have 5 minutes to brainstorm solutions. All teams then race from Point A to Point B simultaneously using their chosen method of travel. If a team is observed with more than four limbs touching the lava, they are must return to the starting line and try again. The winning team is first to cross the finish on only four limbs. The competitive aspect of the race can turn the activity into a high-energy free-for-all.
- **Take Turns:** This version takes longer but encourages more focus from participants. Teams make their attempts one at a time. Determine the order in which the teams will attempt to cross and queue up at the starting line. As one team attempts to cross, the other teams observe without giving any suggestions. If a team fails by having too many limbs in the lava they return to the end of the line. If a team makes it across successfully they can then help the other teams by giving

them suggestions. The goal is to get all teams across, with more collective help coming from the finish line as more teams are successful.

DEBRIEF: Give teams a few minutes to reflect to themselves on their attempts to themselves. What worked? What didn't? What would you try different next time? Then bring all teams together for a group reflection on cooperation, filling roles in a group, and communication to solve a unique problem. What did teammates learn about each other through this activity? How many effective strategies for crossing were developed? Did they utilize brute strength, ingenuity, or a mix of the two?

\*SAFETY NOTE: There will be some heavy lifting attempted during this activity. Review good body mechanics before beginning to prevent injury.

**Providing Recognition to Different Motivational Types:** Ask the students to write a verbal recognition for a volunteer of each motivational type. Ask students to share these with the group.

There is a great deal of information in this course. The idea here is to give students the best tools and guidance for effective leadership and allow them to get practical experience. Through various role playing scenarios, let them figure out and shape their personal styles.

## REFERENCES:

---

*Lightly on the Land: The SCA Trail Building and Maintenance Manual.* 2005. Robert Birkby. The Student Conservation Association and Mountaineers Books.

*Guide to Crew Leadership for Trails.* OSI Trail Skill Series. 2009. Outdoor Stewardship Institute, a program of Volunteers for Outdoor Colorado. [www.voc.org](http://www.voc.org)

PCTA Trail Skills College Curriculum  
Field Reference  
**Course 304. Crew Leadership:  
Managing Volunteers**

---

**STUDENT SKILL OUTCOMES:**

- Understanding of safety protocols and appropriate paperwork
- Learn different leadership and learning styles
- How to teach key concepts to a variety of volunteers
- How to thank and recognize volunteers
- Accurate reporting of work

**TRAIL MAXIM:**

“Those who lead best, lead least.” “Be safe, have fun, get some work done.” “The best place to store a hard hat is on your head.” “Develop and enjoy the mixed curse of trail eyes. You’ll never see trails the same way again.”

**HANDOUTS:**

- Project Paperwork Summary
- Volunteer Application
- Trailhead Communications Plan (TCP)
- Volunteer Sign-In Sheet
- Emergency Action Plan (EAP)
- Tailgate Safety Session & Tool Checklist (TSS)
- Job Hazard Analysis (JHA) (one or more)
- Project Report Form
- Volunteer Injury Packet
- Motivational Characteristics handout

**KEY CONCEPTS:**

- 1) Pre-project Preparation:
  - Job Hazard Analysis (JHA)
  - Emergency Action Plan (EAP)
  - Trailhead Communications Plan (TCP)
- 2) Work Day Management:
  - At the trailhead
    - Welcome
    - Tailgate Safety Session (TSS)
    - Personal Protective Equipment (PPE)
    - Tool/Safety Talk:
      - C-Carrying
      - U-Use
      - S-Storing
      - S-Safety
  - At the work site:

- Walk & Talk
  - Establish work groups
  - Teaching **“Trail Eyes”** to volunteers
  - Correcting mistakes
  - Contingency planning
  - The final 10%
- Post-Project Duties
    - Tools and gear
    - Submit reports
    - Volunteer Follow-up
  - Volunteer Injuries
  - Using Vertex radios
- 3) The Softer Side of Leadership
- Understanding and recognizing different motivational types
  - Understanding different learning styles
  - Being an effective listener
  - Performing conflict resolution
  - Assessing your crew
  - Building group dynamics

**BACKGROUND**

---

The Pacific Crest National Scenic Trail exists largely in part because of the continued and growing support of volunteers. Each year the volunteer program grows and more individuals and groups are working to maintain the trail in a variety of ways year round.

The value of this work is immeasurable and the potential for further growth is endless. Volunteers are available and once they have a positive experience, they are exponentially more likely to return for future projects. The Crew Leader is responsible for shaping these people’s experiences, introducing them to the world of trails and ensuring that they return for many more adventures and continue this successful effort.

Remember that every minute a volunteer is out on the trail is a gift, treat their time as such.

**A One-day vs. a Multi-day Project**

This training is written as if a Crew Leader were

guiding a one-day volunteer project. However much of the curriculum is applicable to and necessary for a multi-day project. There are obviously more logistics in planning a multi-day project, topics such as setting up a base camp and cooking for a crew in the field will be developed as separate courses in the Trails Skills College Curriculum.

## Pre-project Preparation

Note: All forms mentioned in this class are available on the PCTA web site under “Volunteer Resources.” Use the Project Paperwork Summary as a guide.

### Two to six months before the project:

- Prepare a clear project outline.
- Recruit and follow-up with volunteers.
- Meet with any land managers or PCTA staff to review your plans and/or the worksite. Make sure you’ve scouted the project beforehand and understand the scope of work and any site specific concerns.

### One week before the project:

- Gather necessary tools, radios and equipment (BEFORE leaving for the project, inspect tools for sharpness, loose heads, cracked handles.)
- Make sure your first aid kit is up to speed and includes a copy of the Volunteer Injury Packet.
- Complete/Review and print:
  - Volunteer Sign-in Sheet
  - Emergency Action Plan (EAP)
  - Trailhead Communication Plan (TCP)
    - Send TCP to dispatch, agency partners and PCTA staff.
  - Job Hazard Analysis (JHA) for all applicable tasks
  - Tailgate Safety Session & Tool Checklist
- Gather and review volunteer profiles/medical information sheets
- Make extra copies of any necessary forms
- E-mail or call volunteers with directions, weather forecast, etc.

### One to two days before the project:

- Check weather forecast
- Purchase food and/or snacks
- Let someone know when you plan to be in/out of the project
- Get ready to have fun!

**Figure 1. Example of an informational e-mail to volunteers attending a project.**

*I'm delighted you're planning to participate in the PCTA's Echo Lake project on Saturday, September 19!*

*I will be your crew leader for the project, my cell phone number is 916-243-9923. Please plan to meet at Echo Lake's upper parking lot at 9:00 am.*

*Driving Directions (map attached):*

*From Hwy. 50 turn on to Johnson Pass Road (turn for Echo Lake/Echo Portal/Berkeley Camp); turn left on Echo Summit Road which is alternately called Echo Lakes Road. The road will narrow, continue following it to the large parking lot marked on the attached map. If you go all the way to the marina parking, please turn around and park in the upper parking lot. There will be signs up that say "Volunteer Trail Crew."*

*Please wear appropriate work clothes including long pants and sturdy closed-toed shoes. Please bring work gloves, sunblock, lunch, and at least two liters of water. The forecast for Saturday is a high is 78 and sunny.*

*If this is your first time volunteering for a trail project, you might want to watch this 10 minute video on volunteering on a trail crew: [http://pcta.org/videos/vol\\_for\\_trail\\_maint\\_320x240.wmv](http://pcta.org/videos/vol_for_trail_maint_320x240.wmv)*

*If you have any additional questions, please let me know. I look forward to seeing you on Saturday morning!*  
*~ Jennifer*

## Structuring the Work Day

Though each project is unique, establishing a basic structure helps to provide a consistent and successful approach on all trips. Careful planning, knowledge and expertise will ensure a safe and pleasant experience for volunteers.

### Before participants arrive:

- Arrive at least 30-45 minutes early. If volunteers arrive early, engage them in the preparation process; it helps the Crew Leader and allows them to begin to feel necessary.
- Set-up directional signs at confusing junctions and turns, and to reassure volunteers they are heading



- to the right place. (Contact your local PCTA staff person for signs.)
- Set out tools, PPE and other materials.
  - Have coffee, water and/or snacks ready if appropriate (particularly good for early morning starts).
  - Prepare paperwork for volunteer signatures.

**When participants arrive:**

- Welcome volunteers and thank them for coming; make it a point to engage in conversation with each person and find out something about them, especially helpful to discover what motivated each individual to come to the project, where they heard about the volunteer project and what they expect out of the day. This doesn't have to be formal, simply casual, engaging conversation.
- Answer any questions; provide participants with PPE.
- Begin circulating the Volunteer Sign-in Sheet, making sure to note travel time (not mileage).
- It is a good practice to have volunteers put their names on their hard hats with masking tape and a Sharpie. This makes it easier for everyone to remember each other's names and to find your hard hat after lunch.

**Assistant Crew Leader(s):** It's a good idea to have an Assistant Crew Leader or two depending on your group size. If you find yourself at the Trailhead without an Assistant, ask the most experienced volunteer if they would like to assist you for the day. Give them specific instructions and expectations for their role.

**Timeliness:** Be sure to start at the scheduled time or within several minutes. It's only fair to those who have arrived on time and it sets the atmosphere of an organized project. If you know you are waiting on volunteers to arrive, save the Tool/Safety Talk for last. While you cannot encourage tardiness, also be understanding that unforeseen events can and do occur. If you are expecting people and they don't arrive, try calling them before you head to the worksite. If you can't contact the volunteer, leave a note at the trailhead or on a car with directions, bring paperwork, an extra tool and PPE to the work site in case they do show up late.

**Introductions and orientation:** Again thank everyone for coming. Introduce yourself and any staff on the project. It sets volunteers minds at ease to know that they are in the hands of someone experienced and knowledgeable. Next, introduce anyone notable (notable volunteers, agency partners, etc.) and give recognition in the group. This not only recognizes any "trail celebrities" but also allows newcomers to know who to direct questions to. For example: "Bill has done over 100 volunteer projects with us and received the XYZ award in 2005" or "Sue is joining us from ABC ranger district of the XYZ Forest Service. Thanks Sue for coming out." Then provide an opportunity for each individual to introduce themselves to the group. Encourage volunteers to say their name, where they're from, and to share any relevant trail experience they have had. This is also a great opportunity to ask volunteers to share something fun about themselves. It's a great opportunity for people to begin to find commonalities and opens up the lines of communication. It's not always easy meeting a group of new people so structured introductions force people to become comfortable. Even a group who knows each other well can always find out new things about one another. Perhaps their favorite hike, their last wilderness adventure or something as simple as their one luxury item they bring to the woods. You will be covering a lot of heavy material following this, so keep introductions light and fun.

**Crew Leader Tip:** While listening to intros, you may be able to gather valuable information. For example: If John has come from the Bay area to the high Sierras for a project, he may not be acclimatized at this elevation. This is something you can note and observe throughout the day.

**PCTA and the crucial role of volunteers:** Briefly explain the overall mission of the PCTA, your specific volunteer group and thank any members attending for their support. Remind volunteers of the importance of their work and highlight notable volunteer accomplishments especially any significant projects in the area/region that you know of.

**Tailgate Safety Session (MOST IMPORTANT PART OF YOUR DAY!):** Use the Tailgate Safety Session Checklist to make sure you cover all the important topics during this talk. In this session you will cover general safety concerns and site-specific hazards. Safety is the first and foremost priority

of any volunteer project. NOTHING we do on the trail is worth putting yourself or others in danger. Familiarize yourself with all paperwork prior to the project. Check the PCTA's Project Paperwork Summary to remember how to handle each form. Be sure to cover the following:

- **Overview of work:** Provide your group with an honest, brief, yet complete, overview of the day's work. Lay out the goals of the project and set expectations. Be sure to cover hike distance, weather forecast and trail conditions. Also, provide an idea of when the group will meet up for breaks/lunch and what time you expect to finish the day.
- **Job Hazard Analysis (JHA):** These documents explain the hazards associated with the different tasks performed during trail maintenance and rehabilitation as well as what actions to take to avoid these hazards. There are separate documents for each of the following: general trail work, crosscut saws, chain saws, packing with stock, rigging with grip hoists, and using rock drills. These documents are crucial and required.

An effective way to cover the job hazards and mitigation is to have each volunteer tell the group a hazard and what to do to prevent it. You as crew leader can use the JHA as a check off form as volunteers cover hazards. Cover any hazards not addresses by volunteers. Some crew leaders email the appropriate JHAs to volunteers before the project so they have time to read and review the document.

Each volunteer is required to sign the JHA(s) before leaving the trailhead.

- **Emergency Action Plan (EAP) and First Aid:** The EAP is designed to have crucial roles delegated in advance of an accident or serious injury. Ask the group who has medical training and what level; assign that person with the highest level of training as the "First Aid Lead." If not the First Aid Lead, designate the Crew Leader as the "Situation Manager" and designate someone with relevant experience to be the back-up should something happen to you. Make sure everyone knows who is carrying the first aid kit which should contain all volunteer's medical information and the PCTA's Volunteer Injury Instruction packet. Emphasize the importance of informing the Crew Leader of any injuries sustained throughout the day, no matter how small. Ask the group if anyone has several allergies that the First Aid Leader should be aware of and if anyone is carrying an EPI pen.
- **Trailhead Communications Plan (TCP):** This form lists all the location-specific information needed in case of an emergency evacuation. There should be two copies at the project, one with the Communications Lead and one to be sent with the injured person.
- **Personal Protective Equipment (PPE):** Trail work is part of a long tradition of woods work that dates to the 1930s era of the Civilian Conservation Corps (CCC) and to earlier logging. Because workers face many hazards, they wear standard safety gear known as PPE. While the hazards of trail work are often not as great, sometimes they are, so we get to wear the same gear. Different tasks require different PPE, required PPE is listed in the task-specific JHA.

Government agencies require their working trail crews to wear at all times: hard hat, long pants, long-sleeved shirt, sturdy leather boots, and gloves. This is for a variety of reasons, most importantly to provide at least one layer of protection between sharp tools, rocks, and trees and the fragile human body. The PCTA's partner agencies, the U.S. Forest Service, Bureau of Land Management and National Park Service, extend workers compensation coverage to all volunteers (including those of PCTA), as long as they follow safety guidelines. (For a detailed overview of this coverage, read the PCTA's "Volunteer Injury Instructions" available at the PCTA website under "Volunteer Resources" then "Injury Info Packet".) It is also critical that PCTA volunteers follow all prudent safety procedures to protect our organization from liability lawsuits. All crew leaders should feel empowered to enforce the PPE requirements on the JHA and remember that safety is the #1 priority.

While it may be safe to do some trail work tasks without a given item of PPE, circumstances

can change in a moment, then requiring a particular PPE item that might not be at hand. Thus the safest practice, by far, is to wear all standard PPE at all times. While this may lead to some grumbling, whenever you catch yourself saying, “Why the heck am I wearing this \_\_\_\_?” use that as a reminder to shift your focus to a more important question, “How can I carry out this task even safer?” As for the most common complaint, if the weather is hot, simply wear a light weight shirt and pants, and wear a moist bandana under the hard hat.

Making sure that you have appropriate PPE on hand for your volunteers is a crucial step. Bring extra gloves, hard hats and safety glasses for all participants. You may want to have different sizes on hand, especially when working with youth groups. Poor fitting PPE can be more of a hazard than a safety precaution.

- **Other topics to touch on:** The importance of breaks: many volunteers want to work hard (which is great!) but often need to be reminded to pace themselves
  - Hydration: Adults often need to be reminded to drink water, especially on not so hot days
  - Bathroom: Discuss where to use the facilities and encourage Leave No Trace practices
  - Sunscreen: The sun can be incredibly damaging and sunburn can incapacitate the best of us. Share sunscreen or encourage protection from the sun.
  - Communication: Not only communicating needs or injuries to crew leaders but also letting someone know if you’re leaving the worksite, announcing when you’re passing by someone swinging a tool, alerting others before you slide or roll a rock downhill and alerting other volunteers to passing hikers and equestrians.
  - Altitude: As much of our work is done at high altitudes, take precaution if volunteers are not acclimatized, familiarize them with signs and symptoms of altitude sickness and again encourage them to inform you of any symptoms.

**Tool Talk:** Each tool’s function and use is highlighted in other Trails Skills College courses. BEFORE the project inspect the tools for sharpness, loose heads and cracked handles. Flag and separate any broken or questionable tools. An effective way to lead a tool talk is to have each volunteer pick one tool and tell the group what it does or what they suspect it might do. You can fill in any other relevant information as they go. This not only alleviates the Crew Leader from talking for awhile but also engages the volunteers and allows them to demonstrate their knowledge.

In your tool talk, remember the acronym “CUSS”:

#### C-Carrying

- Wear gloves when handling tools.
- Use safety sheaths/scabbards when appropriate.
- Carry tools at your side, not on your shoulder (Exceptions: rock bars, chain saws with scabbards).
- Carry tools (or the heavier/more dangerous tool if you have multiple) on the downhill side of the trail to easily throw out of your way should you fall.
- Carry tools with their most dangerous side facing down. This is a difficult decision with some tools, talk with volunteers to determine which is the most dangerous side of tools like the McLeod and the pick mattock.
- Maintain a safe distance between people when hiking with tools. It is everyone’s individual responsibility to monitor the person in front of them.

#### U-Use

- Know your tools and their proper use; use the proper tool for the proper job.
- Check handles of tools for splits and heads for security, do not use a damaged tool.
- Your body is your most important tool. Engage proper body mechanics when using a tool or lifting/carrying materials. When proper body mechanics are used, you increase the longevity of your ability to work.
- In general, tools do not need to be swung above your head. Short swings from shoulder height are effective. Putting a tool above your head not only puts additional strain on your body but in the case of tools with removable heads, it increases your risk of injury by the tool as the head could slip off. In the event that you do require an overhead swing be sure to announce this to those around you and clear the area of brush that could catch the tool.

- Let gravity work for you, your downswing with a tool should not require much effort.
- When swinging a tool, as you pull the tool up, slide your one hand up the handle of the tool. As the tool begins its downswing, slide your hand down the handle to meet your other hand at the base. This helps guide the tool and give you more control.
- Establish communication signals for lifting or otherwise moving rocks, logs, etc. A useful technique to employ is for one person to be the designated caller for the group. Instead of asking "Is everyone ready?" the caller should ask "Is anyone not ready?" This eliminates the confusion of multiple people answering at once. The caller should then instruct the group to roll/move on their count of three. Moving logs and rocks is the cause of many injuries in the field. Be especially aware of strains to back and knees using improper body mechanics or moving too heavy materials. Also note hand placement and body placement when moving materials. Slide or roll rocks away from yourself, downhill and NEVER put your hand under rocks or logs that are propped up by tools or other workers.
- When moving materials downhill, be sure that the area is clear of hikers or other volunteers. Announce loudly that you are moving something to alert to the group and receive confirmation that you are heard. Things can get away from you quickly and unexpectedly. Most work situations do not involve closing the trail off to the public so know who's where and in the event of moving extremely dangerous material you may want to consider having someone stationed up and down trail from the worksite to prevent anyone from inadvertently crossing into the danger zone.
- Use the "10-foot Rule" (aka "Dime," "Circle of Death," or "Blood Bubble") when swinging tools. Each crew member should have a 10 foot "bubble" of space between them and the closest person to them. This can be easily demonstrated by holding a tool, extending your arm and making a circle around you. Some projects, like rock work, require that people work closer together. In these cases, you must simply utilize awareness and good communication.
- When passing by someone working on the trail be sure to announce "coming by" or "passing through" and remember that this is a request for passage and not a demand. Be sure the individual hears and acknowledges your request before stepping into their "dime".
- Be aware of your footing, especially in wet slippery conditions or on a steep slope.

### S-Storing

- Utilize the Tools Checklist to keep track of how many of each tool is brought to the worksite and empower one of the volunteers to be the "Tool Manager," ensuring that the group leaves with everything they came with. Marking your tools with brightly colored paint or distinct patterns can not only help distinguish ownership but also can be a great assistance when looking for a lost tool in the brush along the trail.
- Store tools off the trail on the uphill side with the handles pointed toward the trail and the sharp ends uphill always, even if you're setting it down just for a minute.
- Note special storage for individual tools. For example, shovels should be pointed sharp side down to prevent the famous cartoon moment of someone stepping on the tool and the handle whacking them in the face. Rock bars should be secured on the uphill side so they do not escape and act as javelins to innocent passersby.
- When caching tools overnight or for long periods of time, be sure to find a discreet location off the trail (that can be easily located by you) and protect the tools from the elements by wrapping them in a tarp or otherwise covering them.

### S-Safety

- Use **Go/No Go** to determine if trail workers should proceed with a task or walk away to insure their safety. Crew leaders sometimes exercise such judgement for a group, but it is essential that every trail worker develop these critical thinking skills for times when they work on their own. Such analysis evaluates all the hazards present and balances them against the skills they have. *For a decision to proceed, a trail worker should be able to predict with a high confidence level, exactly what will happen during the task (such as which way logs will move in a series of cuts in a pile up). If they are unable to predict the outcome with confidence they should walk away.* The most important thing every trail worker needs to know is that it is totally OK, and they show the very best judgement, when they walk away from danger without completing a task. Of course, it is essential to report the need for a more skilled crew to complete the hazardous work.
- Ask people if they have any specific safety concerns and encourage them to take an active part in



- promoting safety especially if they observe unsafe conditions and practices around them.
- If you are leading a multi-day project, conduct a refresher tool and safety talk each. Ask volunteers if they noticed any unsafe safety or tool practices the previous day.
- PPE, PPE, PPE; you cannot emphasize the importance of this enough.
- Use skill and technique over force and power.
- Be alert and aware at all times, take frequent breaks. Mental well being is equally as important as physical.
- Trade tools periodically throughout the day if possible. Repetitive stress causes a lot of injuries. Everyone has varying degrees of coordination. It takes some people longer than others to become comfortable with a new tool. Challenge people to broaden their horizons but allow them to use what they feel comfortable with and spend as much time as necessary time training individuals how to be comfortable and safe with new tools.
- Remember even individuals with years of experience can have bad habits. Safety should be regularly discussed with every group on every project, regardless of experience level. It's a good reminder to keep safety fresh in everyone's minds.

**Warm-up Stretching:** Some Crew Leaders prefer to do warm-up stretches at the trailhead and others halfway through the hike or upon arrival to the worksite. Whenever you choose to do this, it is an integral part of your work day. This can be done as a group-led exercise or individually. Stretching can also take place simultaneously with other discussions, but not when relaying incredibly crucial information that could be ignored. In groups of younger people it can be fun to employ theme stretches or games to warm up. Stretching can be fun and enjoyable in addition to being immensely productive in preparing the body for a day's work. Trail work employs significant muscle use that differs from what most people's bodies are used to, so be sure to stress loosening muscles in body parts like the hands, which can cramp up easily after a day of tool use. Continuing to stretch throughout the day and at the end of the day will ease impact on your body as well. Remember even the fittest of athletes stretch before working their bodies!

## At the Work Site

**Walk & Talk:** You can make the choice here whether to start work from the trailhead (or that direction) and work out or to begin at the furthest point and work back towards the trailhead. Starting at the trailhead allows you to cross back over your work at the end of the day. Starting at the furthest point out allows you to be closer to your vehicles and lessens the end of the day hike. While there are benefits to both structures and much debate over the better method, it is largely a matter of personal preference. A particular project may better lend itself to one structure over another.

Regardless of how you structure lining out the work, upon arriving at the work site with the entire group, go over the day's work. Point out specific projects and if necessary, use this as an opportunity to discuss key trail terms and site specific concerns. This will give participants a visual understanding of the work and allow them to think about what specifically they are interested in spending their day doing. Cover each project clearly, thoroughly and concisely. Allow time for questions and return to any larger, more detailed projects for further explanation once work begins. It is much easier to answer questions upfront than to correct mistakes later.

If this is a multi-day project, go over the previous day's accomplishments and note any changes that need to be made. Mistakes and necessary corrections can be noted to the group tactfully but are better discussed with individuals. No one sets out to do bad work and it's the Crew Leader to ensure people are given the necessary tools and knowledge to do good work.

Not all necessary information can be conveyed in this initial "Walk and Talk." The Crew Leader must be active THROUGHOUT the day continually providing guidance and instruction. Make use of teachable moments, there are many things you cannot prepare for and the best learning takes place when it occurs naturally in working through the process of a task. In addition to teachable moments in work skills, provide or encourage others to point out things such as interesting flora and fauna or a notable geological feature. The more people understand about the environment around them, the more interested they'll be in spending time exploring and protecting it. Often volunteers can be great

resources of local knowledge, so encourage an atmosphere where sharing of these tidbits is welcomed and appreciated.

**Establish Work Groups:** Most often a volunteer crew will be divided into smaller work teams. Find out what volunteers are most interested in doing. This is their project and as much as possible, without sacrificing safety or quality, you want to ensure that people's needs and desires are being met. Volunteers should be able to walk away at the end of the day feeling a sense of accomplishment at a job well done. You can often pair a new volunteer with a more experienced one or empower a frequent volunteer to share their skills and knowledge with others in this way. You as the crew leader do not have to do all the teaching. Chances are you have a wealth of resources in your volunteer group, so use them wisely.

Line out the work for each group and get them started on their projects. Make each group aware of where the others will be working, and when and where everyone will meet for breaks or lunch.

**Lunch Chat:** It is important to regroup for breaks or lunch as this is as much a social activity as anything else for many volunteers. After volunteers have finished their lunches and are relaxing, use this time to have a "lunch chat." Since this is one of the few times during the day when you will have all the volunteers together, remind them about safety on the project, provide an update on the progress of the work groups, remind volunteers of the plan for the remainder of the day, and again thank them for volunteering.

**Teaching "Trail Eyes":** While the Crew Leader can simply point out features of the trail that need work, it is highly beneficial to begin to foster independence in your volunteers by teaching them to see the trail from a trail maintainer's perspective, or with their "trail eyes".

As with any new endeavor, a volunteer needs to develop a heightened awareness of the trails they travel. Frequently new volunteers have been trail users for some time, they have well developed habits of awareness that are, quite naturally, focused on the scenery, their horse, etc., rather than on drain dips, berm, waterbars and tread erosion. They were quite busy enjoying themselves without paying attention to the trail, other than obvious hazards.

The need to develop a heightened awareness of trail maintenance issues is essential, quite simply, because if new volunteers fail to notice the work needing to be done, they won't stop to do it. This initial lack of awareness can't be underestimated; I have seen many new volunteers instinctively duck under branches along a trail, without noticing they needed to be cut out. The ability to see a nearly full drain dip really does take well developed "trail eyes."

There are many ways to help volunteers develop trail eyes, but a common approach asks one volunteers at a time to walk in front of the group identifying trail problems or well functioning features. A little humor never hurts, encouraging them to "put on their beautiful trail eyes".

**Correcting Volunteer's Work:** Again, remember that no volunteer sets out to do bad work. It is the Crew Leader's responsibility to ensure that volunteers are given the tools and guidance necessary to perform quality work and to monitor work throughout the day. Everyone has different styles, so talk to the volunteer about what they were setting out to do and what their vision was. Perhaps they know something you don't or are have the right thought process but have executed their ideas inappropriately. Working through mistakes can be the best learning tool out there. Everyone makes mistakes, even the most seasoned volunteers, yet it's still best to be careful to engage tact and to not publicly shame volunteers for their lack of knowledge or experience.

Many veteran trail volunteers have also picked up bad habits along the line somewhere. To an extent, confronting these situations you have to employ the "pick your battles" mentality. However, it is always a tricky battle encouraging someone to change old habits. It is prudent to consider whether the work being done is a detriment to safety or function of the trail or whether it is a stylistic difference. Choose your words carefully and attempt to make suggestions such as "Maybe you could consider..." or "I try to look at it like this..."

In the end, the Crew Leader is in charge. Follow the trail specifications for the trail and consult resources as necessary. If a volunteer is doing something you are unsure of, you can always move them to a different project. Mistakes that are allowed to go too far can be very time consuming to fix and more importantly can quickly turn into hazards.

**Contingency Plans:** Sometimes things don't go as planned. The most effective strategy in dealing with unforeseen circumstances is to develop a plan for how to handle situations before they arise.

Some situations to consider include:

- **Volunteer can't do the work/make the hike to the worksite:** Try changing their duties. Find a project that they can accomplish happily and effectively. Can you find a project closer to the trailhead to put them and a few other folks on? Provide positive reinforcement on the tasks that they can do well. If a volunteer doesn't want to work with tools, perhaps they could scout ahead on the trail, record work accomplished or head back to camp with the cook crew to start dinner.
- **Registered volunteer doesn't arrive:** Attempt to make contact and see if there's anything you can do to assist in their arrival without putting out the rest of the group. If you leave the meeting area without someone, be sure to leave a note with directions to the worksite and carry extra PPE and a toll with you, should that person arrive. If they do not arrive, be sure to note this to staff in your reporting.
- **Volunteer refuses to wear/use ppe:** (See PPE section above.) Remember that safety is the #1 priority and feel empowered to enforce the requirements on the JHA.
- **Volunteer wants to leave early:** Talk with them to learn the reason. Whatever the reason, be sure that they arrive at their vehicle safely. Have someone hike out with them if possible.
- **Inclement weather:** Keep everyone safe and happy. Make a prudent decision to leave the worksite should safety or well being be compromised. Make a solid assessment of your crew's skill and experience level working in sub-optimal conditions. Know what gear your crew has to protect them from the elements and whether that is sufficient for the situation.
- **Asking a volunteer to leave:** Talk with them. Find out what it will take to make this a positive experience for them and the group. If all conflict resolution strategies fail, ask the volunteer to leave and escort them to the trailhead. People volunteer because it makes them happy and one problem volunteer can ruin the experience for a group. Be sure to send them home as only a last resort and if it does come to this, report it to a staff member.

**Crew Leader's role throughout the day:** Crew Leaders take on their role in part due to passion for the trail, a love for getting dirty and doing quality work. However, when guiding volunteers in trail work, you have to find a balance of swinging tools and being a resource for others. Some people contend that the Crew Leader shouldn't be working with tools at all. Others contend that you lead best by setting the example for the crew. Find the balance that works best for you. Whatever that balance may be, you have other goals to meet throughout the day.

You must:

- Keep people busy, engaged and interested.
- Provide varying tasks and meaningful work
- Make sure breaks occur and the schedule is adhered to.
- Watch for safety issues.
- Monitor environmental conditions.
- Monitor quality and consistency of work.
- Provide explanations and instruction to each work group.
- Utilize teachable moments.
- Talk with everyone, facilitate good communication.
- Hand out goodies and praise!
- Conduct ongoing assessment of each volunteer.
- Monitor progress of work and record accomplishments.

## Ending the Work Day

Before you start the hike back to the trailhead, assign an experienced volunteer to sweep the work areas along the trail for trash, gear or tools.

Ask the Tool Manager to pull out the Tools Checklist to see if volunteers have all the tools that were brought to the worksite to ensure that volunteers leave with everything they came with.

**The Final 10%:** End the work day strong! The final details are often what separate good work from excellent work. When users come onto the trail we want them to have no idea that a crew has just been in there doing work. Of course, it's great to show off your accomplishments and once you get your **"trail eyes"** you will always notice work done and need for work on a trail. However, there is a mystique surrounding trails and you can utilize some simple trail psychology and put those final polishing touches on the trail to cause people to think this fantastic path has just always been there. This may mean ensuring that cut brush is thrown inconspicuously off the trail and that cut branches are disguised with a little smudge of dirt or that you spend some time rehabilitating your lunch spot that you've used for the past week. Crew Leaders should allow time in the schedule for the final 10% of effort and motivate crews to take the time to leave the trail looking polished and spectacular.

Once you reach the trailhead or car, ask the Tool Manager to again pull out the Tools Checklist to see if all the tools are accounted for.

**Reviewing Accomplishments:** It is important for your own reporting to have an accurate and thorough understanding of the work completed. It is also rewarding for volunteers to understand the impact and scope of their accomplishments. "We built 800 feet of new trail" or "We installed 4 water bars" is significantly more concrete than "We did some trail work." Make sure to show praise and appreciation for a job well done.

**Closure:** Once back at the trailhead (on time of course!) be sure to thank volunteers yet again. Consider providing appropriate refreshments and/or snacks. This bonding time is crucial and oftentimes what draws people to return. Laughing, telling battle stories and highlighting accomplishments is often the highlight of many people's day. Use this time to hand out any materials you want to send the volunteers home with, share information about the next project and solicit feedback on the day.

If you are working on a multi-day project, this time of congregation is important daily, but be sure to allow ample time on the last day for closure activities.

**Feedback:** Getting on-site feedback from participants while the day's events are fresh in their mind can be incredibly productive. Some Crew Leaders favor informal discussion, while others prefer to use a structured debrief or a written form. A simple structured debrief is to ask each volunteer to share one positive, one negative and one thing they might change about their day. There are countless other debriefs a Crew Leader can utilize and you will have to decide based on what information you want to gather. Bear in mind that there may be things someone isn't comfortable sharing in the group, so provide opportunity for them to share those thoughts later in a different format. This could be as easy as an anonymous survey to mail back or simply giving them your contact information. Having participants reflect on their experience is part of the experience for them as well as useful for you to know what works well or doesn't work for future projects.

Make sure everyone departs safely and do a final sweep of the area to ensure your group hasn't left anything behind!

## Post-Project Duties

**Tools and Gear:** Return any borrowed tools, radios, etc. to their rightful owners. Mark equipment that needs maintenance. Perform any necessary upkeep and maintenance on your own tools. You want to keep them in good shape for future use!

**Submit Reports:** Complete and send in the PCTA's Project Report Form and signed project



paperwork: volunteer sign-in sheet, JHAs, and volunteer profile forms. (Refer to the Project Paperwork Summary.) Be sure that all participants are given credit for their hours and all accomplishments are noted. Also make notes of any work left incomplete, so future Crew Leaders, PCTA staff, and agency partners will know the status of work in an area. Be sure to send along any photos of your work as well!

**Follow-up:** It is a good practice to send an e-mail to the volunteers again thanking them for their work. You may want to include upcoming projects, a memorable story and if you have them, pictures. For many people, connecting via online groups is a way to carry on the social benefits gained from a project. The memories of a day's work can carry far beyond the project site. This type of ongoing community is also what gets folks coming back together on future projects. If you desire further feedback than that gained on the project site, this may be a useful venue for that as well.

## Volunteer Injuries

What if a volunteer is injured on the project? A volunteer working on the PCT is officially a volunteer of the USFS, BLM or NPS, and is entitled to certain protections when safety requirements and current volunteer agreements are in place. These volunteer protections are especially important in case of an injury involving a PCT volunteer. It is important that volunteers, volunteer leaders, and agency partners know what to do in case of an injury involving a PCT volunteer.

**VIF/VIP:** There are two separate laws which authorize the U.S. Forest Service and National Park Service agencies to work with volunteers and provide them certain protections. VIF (Volunteers in Forests) is the Volunteers in the National Forests Act of 1972 which applies to the USFS. VIP (Volunteers in Parks) is the Volunteers in the National Parks Act of 1969 which applies to NPS.

**BLM Volunteers:** The authority for the volunteer program in the BLM is found in the Federal Land Policy and Management Act of 1976 (FLPMA), as amended, including amendment by Public Law 980540 of 1984 (BLM Volunteers for the Public Lands Statue), the Federal Tort Claims Act, and Provisions of the United States Code which authorizes compensation for work injuries.

In all three federal agencies, volunteers are considered to be federal employees for purposes of:

- 1) compensation for work-related injuries or illnesses under the Federal Employees Compensation Act (FECA), relating primarily to costs for medical care in case of injury or illness; and
- 2) protection from tort claims, under the Federal Tort Claims Act, which may be filed by anyone who may claim to have sustained personal injury or property damage due to the actions of a volunteer; and
- 3) claims relating to damage or loss of personal property of the volunteer while performing volunteer service.

Volunteers are not considered to be federal employees for purposes of pay, benefits, retirement, or unemployment compensation.

**California State Parks Volunteers:** Volunteers working on the PCT in California State Parks are covered under the federal agency that the easement is granted to from California State Parks. This will be either the USFS or BLM.

Review the details of the Volunteer Injury Packet and Instruction sheet. For more information on volunteer work-related illnesses, tort protections, or personal property losses, contact the PCTA's Trail Operations Manager.

## Using Vertex Radios and Working with Dispatch

**Prior to your work party:** You may find it helpful to contact your local agency dispatch via email or telephone, to let them know you are a PCTA volunteer trail crew going on a project and pass on your itinerary. Besides, it's a nice touch to have some personal contact and chat with the folks who are looking out for you. You can also use your cell phone to check in and out with them. The Dispatch



operating hours change seasonally; make sure you know their operating hours so you can call them with your out of service message before they close for the day.

### **Basic Operation:**

- Turn the Radio on using the OFF-VOL dial on the top of the handheld. This also adjusts your listening volume.
- To speak, listen to make sure there is no other traffic on the radio, then press and hold the largest button on the handheld's left side while speaking into the grated speaker area on the front.  
*Remember to press and hold for two seconds before starting to talk – otherwise the beginning of your transmission will be cut off by the repeater delay.*
- As volunteers, we usually communicate in one of two ways depending on which channel we have selected. One way is using the repeater system where many people, such as Dispatch, monitor our conversation. The other way is communicating within the work party as walkie talkies. If someone else is near the crew and is also tuned to the work channel, they might also hear the conversation.

### **Channels and Repeaters:**

- Vertex radios operate on a repeater system, meaning that transmissions pass between your radio and a nearby repeater tower, which in turn relays them to the rest of the system.
- You will need to tune your radio to send and receive transmissions from the correct repeater – usually the one nearest to you or with the best signal for your location. Note that some repeater locations have multiple frequencies and antennas that cover different areas.
- To change channels on your radio, turn the dial next to the OFF-VOL dial on top of the radio. The small marker on the radio points to the channel the radio is tuned to, and the name of that channel appears on the LCD display on the front of the radio.
- To determine the correct channel to turn to, ask your PCTA Regional Rep or USFS partner before heading out.
- If necessary, you can confirm that you are successfully transmitting and receiving on a given channel by briefly pressing and releasing the talk button on your radio. If you are successfully “hitting” the repeater, you will hear a moment of static and a click from your radio. You will also see a red light (while transmitting), followed by a green light (from the repeater signal) on the radio. Don't do this too much or Dispatch will think there is someone trying to reach them.

### **Basic Steps for Transmitting or Responding to a Radio Call:**

- Conversations start by the caller saying the last name of the person (or Dispatch entity) she is calling, her own last name, and the name of the channel or repeater she is using on. For example: “Hawley, this is Owen on Hickman” or “Cobb this is Queen on Work.”
- Then, the person receiving the call repeats her caller's name, then their own name: “Queen, Cobb” or “Queen this is Cobb go ahead”
- Then the conversation takes place in an efficient, brief manner. Remember that every radio for hundreds of miles can hear you: “I am leaving the trailhead and am heading back to Zigzag”
- Assuming the receiver hears the transmission, they confirm as much: “I copy that. I'll meet you there.”
- Finally, the caller signs off with their name, followed by the receiver: “Cobb clear” or “Queen”
- You should always call Dispatch with an “In Service” message at the start of your work party. Call Dispatch with an “Out of Service” when you are done for the day. You should also let them know if you deviate from your itinerary. Conversations with Dispatch follow the same format, with “Dispatch” used for the dispatcher's name. At the end of a conversation, the dispatcher might sign off with a time and a call number such as “KOE598, 0729”
- Dispatch may also ask you for a Township, Range, and Section number for the area you are referring to.

Example conversation at the beginning and end of the work party:

Listen to make sure the channel is clear

Kim Owen: “Columbia Dispatch, this is Owen on Hickman”

Dispatch: “Owen this is Dispatch, go ahead”

Kim Owen: “Owen plus 8 is in service at the Ramona Falls Trail head. We are a PCTA volunteer

work crew headed to Ramona Falls today – and plan to return to the trail head by 1600.”

*Dispatch:* “Copy that Owen do you have the coordinates for your work destination?”

Kim Owen: “Affirmative Dispatch. We will be working at Township 3 South, Range 8 East, Section 12.”

*Dispatch:* “Copy Owen, give a call when you are back at the trail head. KOE598 0828 clear.”

Kim Owen: “Owen”

When you are back at the TH, call with an out of service message

Kim Owen: “Columbia Dispatch this is Owen on Hickman”

*Dispatch:* “Owen this is Columbia, go ahead”

Kim Owen: “Columbia, Owen plus 8 are out of service for the day at the Ramona Falls Trailhead.”

*Dispatch:* “Copy Owen, have a good evening, KOE598 1605 clear.”

Kim Owen: “Owen”

### Radio Storage:

- It's okay for these radios and batteries to be left plugged in indefinitely to charge. If not left plugged in, it's a good idea to plug them in overnight every six months so the battery does not discharge completely. Ditto for the spare batteries. Also, charging them below 50 degrees F will reduce their battery life.
- The Vertex radios are weather resistant, but not water proof. Please keep them out of the rain when possible.

## The Softer Side of Leadership

Much of a Crew Leader's role is ensuring that quality work is done and that safe practices are observed. However, your job is largely people management. There are numerous “soft” skills that go into being an effective leader and facilitating positive group dynamics. You must understand volunteer's motivation and learning styles, be an active and effective listener, know how to assess your volunteers, and possess skills for conflict resolution and building group dynamics.

**Understanding Motivational Types** (from OSI's Crew Leadership For Trails): Researchers David McClelland and John Atkinson suggest that there are three different motivating characteristics in human behavior. Although they acknowledge that most individuals have a mix of all three types, one tends to dominate.

The three characteristic types identified are:

- **THE ACHIEVER:** This person is committed to accomplishing goals, welcomes a new challenge and looks for opportunities to test out new skills and improve performance.
- **THE AFFILIATOR:** This person values relationships, enjoys working with others and seeks out opportunities to be helpful and supportive.
- **THE POWER PERSON:** This person seeks to influence people and events so that change is realized.

No one style is better than the other. In fact, most successful projects require a mix of styles to blend the work of a group. Teams that include a variety of styles benefit from the different perspectives people bring to the task. However, people with different styles prefer different types of supervision, recognition and job placement. It is helpful to determine the preferred style of a crew member in order to provide an effective match. Distribute and review the Motivational Characteristics handout and exercise from OSI's Crew Leadership for Trails, they describe characteristics of each motivational type and the kind of supervision that is most effective. (Motivational Characteristics are listed on the next three pages.)

**Learning Styles:** There are three primary learning styles to be aware of when teaching skills to a new group. Each person learns differently, so be sure to incorporate elements that will appeal to each learning style when presenting information. The three main learning styles are visual, auditory and

kinesthetic. This is a very simplified breakdown of learning styles and much more extensive research is available.

- **Visual Learners:** Learn through seeing. These learners need to see the teacher's body language and facial expression to fully understand the content of a lesson. They tend to prefer sitting in front of the classroom and taking notes. They may think in pictures and learn best from visual displays including: diagrams, charts and hand-outs.
- **Auditory Learners:** Learn through listening. They learn best through verbal lectures, discussions, talking things through and listening to what others have to say. Auditory learners interpret the underlying meanings of speech through listening to tone of voice, pitch, speed and other nuances. Written information may have little meaning until it is heard. These learners often benefit from lecture and discussion.
- **Tactile/Kinesthetic Learners:** Learn through moving, doing and touching. These people learn best through a hands-on approach, actively exploring the physical world around them. They may find it hard to sit still for long periods and may become distracted by their need for activity and exploration. Their mantra is often "let me do it, then I'll understand."

**Being an Effective Listener** (from OSI's Crew Leadership For Trails): To be an effective listener, one must be an active listener. The most helpful thing to remember when listening is simple: stop talking. As a Crew Leader it is paramount to the success of volunteers that you are truly listening to your volunteers. Any number of things are liable to distract you, but simply listening to your volunteers can give you a lot of beneficial information about them and their attitudes on that particular day, how you can more effectively lead them and how their future as a volunteer will play out.

Positive Listening Techniques:

- Stop talking. You can't listen and talk at the same time.
- Lean forward and make eye contact.
- Be patient, allow the speaker time and ignore distractions.
- Empathize with the Crew Member.
- Hold your temper - anger displays more than words.
- Focus on the problem, not on the personality.
- Be open - consider the speaker's feelings and opinions.
- Demonstrate equality, not superiority.
- Maintain a problem-solving attitude.
- Show tolerance for ambiguity.
- Be aware of others in the group.

Negative Listening Techniques:

- Criticize or argue.
- Be confrontational.
- Act exasperated or walk away.
- Interrupt or be obstructive.
- Be a "yes man".

Questions & Phases that Prompt Communications:

- Can you expand on that?
- What solutions/choices do you see?
- What needs to be done?
- How do you feel about that?
- How important is that to you?
- How do you plan to do it?
- I'm glad you brought that to my attention.
- What are your major concerns?
- How can I help?
- What is the best way to work it out?
- What do you think?
- How did you come to your decision?
- That is important. What solutions do you see?

**Conflict Resolution:** It would be nice to think that every volunteer project will be conflict-free. However, when a diverse group of individuals spend any length of time together, conflict can be inevitable. The key is preventing it when possible and handling it well should issues arise. Well-managed conflict can actually become a very positive learning experience. Conflict can arise from any number of issues ranging from differing belief systems to personality clashes to perception differences. Conflict can occur within an individual (intra-personal), between two people (interpersonal) or amongst a group (intra-group).

### **Tips for Effectively Managing Conflict:**

- Real issues driving many conflicts are rarely obvious.
- Separate the people involved in the conflict from the rest of the group for privacy unless it is a group issue.
- Clarify issues and find common ground.
- You are in charge of how you respond.
- Avoid pre-formed judgments.
- Solutions lie in building trust and open dialogue.
- A vision of success is required.

**Assessing Your Crew:** Assessing your crew is an ongoing process and many of these elements have already been discussed, however having a complete picture allows you to be proactive in your leadership and to ensure a positive experience.

Here are a few levels on which to remember to be regularly assessing your crew:

- **Expectation:** Remember, each person has different motivations for volunteering. The more of these expectations that can be fulfilled, the better the experience for the volunteer and the more likely they will return in the future
- **Skill:** Know your crew members skill sets and utilize them effectively.
- **Personalities:** Always a combination in every group! Allow people to shine as individuals and give them tasks that suit their personalities
- **Safety:** Personal safety, group safety and mental well being. While individuals can be responsible for their own safety, it is ultimately the crew leader's responsibility to monitor and assess all aspects to ensure that all safety procedures are being followed throughout the day.

**Recognizing Differences:** No group of volunteers will be entirely uniform. However, a comfortable atmosphere is important for all volunteers and it is the crew leader's responsibility to ensure that needs are being met and that all members of the group are comfortable both physically and emotionally.

- **Generational differences:** Recognize that some leadership methods may need to be adjusted depending on the age of your volunteers. What is effective for high school youth groups will not necessarily work for a group of retirees.
  - “Matures” born between 1909 and 1945. Driven by the ideals of duty and sacrifice. Often measure a work ethic on timeliness, productivity and not drawing attention to oneself.
  - “Baby Boomers” the first “Me” generation was born between 1946 and 1964. One of the largest generations in history, they dominate today's workplace with 80 million members. Their work ethic is measured in hours spent on the job. They are team oriented and consider relationship building skills as critical for success.
  - “Generation X” born between 1965 and 1979. Taught to question authority. Productivity on the job matters more than time on the job. They invest loyalty in people, not companies and have embraced a carpe diem attitude
  - “New Millennials” born between 1980 and 2000. They have been coddled since birth, protected by their parents. They are technology gurus. They seek open, constant communication from the boss and seek personal fulfillment from their jobs, not necessarily financial security yet. They are torn between individuality and fitting in.
- **Gender differences:** Be cautious to not reinforce stereotypes and to create an atmosphere where men and women feel capable, respected and valued.
- **Background/Experience:** Inevitably, volunteers will have varying levels of experience and vastly different outdoor backgrounds. While one volunteer may be well versed in wild edibles, another may have never used the bathroom in the woods. Only ask people to take on what they are comfortable with and guide your leadership to accommodate everyone.

### **Building Group Dynamics:**

A group will naturally form its own dynamic over the course of their work together. You can facilitate this being a positive relationship in a number of ways.

- Talk with each person each day and encourage others to do the same.
- Facilitate games, riddles or any other activity that encourages people to have fun especially during break and lunch time! Adults love this too!
- Foster an atmosphere of respect.
- Bring the group back together for meals and at the end of the day-this is when development happens.
- Vary work teams as much as possible.
- Check in with your volunteers frequently.
- Involve the volunteers in as much of the decision making process as possible. Use consensus when possible to make sure that everyone's needs are being met.
- Model what you expect from others-both on and off the trail.
- LISTEN.
- Keep structure, limit unknowns.
- Have high but attainable expectations.
- Encourage leadership in others.

**Inspiring people, being a motivator:** Many veteran trail volunteers can list of a number of people, places and events that inspired them to pursue their passions on the trail. By maintaining a positive attitude and leading by example, you set the tone for inspiring your own volunteers. Motivating a group can be as simple as passing around candy during a long afternoon or as thoughtful as sharing a book with one of your volunteers. However you choose to motivate, know that you have the potential to inspire a lot of people. Often this extends beyond your volunteers crew. Hikers and trail users may pass by your group doing work and be motivated to volunteer in the future. (It's a good idea to carry a few brochures in your pack to pass out to trail users you encounter during the work day.) A campground host may learn for the first time of an active volunteer community in the area. So talk with folks, wear your most positive attitude and your brightest smile and you never know who you can influence!