

Pacific Crest Trail Association

Saw Training and Certification Program Policy

Since the creation of the Pacific Crest National Scenic Trail (PCT), the U.S. Forest Service, the Bureau of Land Management, the National Park Service and the California State Parks have been responsible for ensuring the maximum enjoyment of and safe access to the PCT by the public: to that end they are authorized and encouraged to fully utilize volunteer assistance. These partners have entered into agreements with the Pacific Crest Trail Association (PCTA) for the accomplishment of certain operations and maintenance responsibilities on the PCT.

These partners recognize and support the essential roles of non-profit staff and volunteers in the construction, operation and maintenance of the Trail and its facilities, in order to keep the Trail open and passable for public use. The quality training and safety of all PCT volunteers is a principal concern of both agencies and the PCTA. To help volunteers be successful in their trail work, PCTA collaborated with agency partners to develop the Trail Skills College program where volunteers learn safe equipment use, and trail construction and maintenance techniques. Each year the PCTA and their partners host many Trail Skills Colleges along the PCT where volunteers and agency instructors train new and returning volunteers who are eager to increase their knowledge and skills. The use of both chain and crosscut saws has been frequently and routinely required of PCTA staff and volunteers in order to accomplish their roles. Agency partners and the PCTA recognize that a consistent, trailwide program for the training and certification of chain and crosscut saw operators is necessary to ensure the safety of PCTA staff and volunteers. The PCTA's Trail Skills College includes a series of saw operator safety classes and skill development to train volunteers in preparation for the Saw Training and Certification Program.

Background

In 2009 the PCTA signed a memorandum of understanding (MOU) with the U.S. Forest Service (USFS), the Bureau of Land Management (BLM), the National Park Service (NPS) and the California State Parks providing a framework of cooperation regarding chain and crosscut saw training and certification. The signatory parties of the MOU accept and recognize as valid the certifications of chain and crosscut saw operators including those trained and certified by Forest Service instructors, National Park Service instructors, Bureau of Land Management instructors, and PCTA-affiliated instructors.

To fulfill its obligations towards that MOU and to ensure effective management of its program, the PCTA drafted the following Saw Training and Certification Program. It establishes requirements for operational control of chain and crosscut saws, and implementation of applicable regulations, equipment, training requirements and certifications. It does not cover the roles and responsibilities of federal agencies outlined in the 2009 MOU on pages 12 and 13.

This program had its beginning in 2007 when Winston Rall, USFS Region 6 Health and Safety Specialist, recognized that the scarcity of saw certification opportunities was an impediment to volunteer trail work and foresaw that capable volunteer organizations could become self-sufficient to conduct saw certifications. Recognizing PCTA's excellent safety record, Winston selected a few PCTA volunteer sawyers and personally trained them to conduct saw trainings

and evaluations. In order to qualify for the training, volunteers had to demonstrate not only proficient use of the saw, but also excellent teaching and record-keeping skills. Five PCTA volunteers in Oregon and Washington became instructors, and have been working with individual forests along the PCT, teaching and conducting field evaluations at large training events and small work-parties. Winston has played an active role in the ongoing development of PCTA's Saw Training and Certification Program.

Overview

Safety is paramount for volunteers working on the Pacific Crest National Scenic Trail; the PCTA, in conjunction with its agency partners and their programs, will provide the best possible chain and crosscut saw training and certification courses for their staff and volunteers.

PCTA staff and volunteers shall not operate chain or crosscut saws unless they hold a recognized and valid sawyer certification, and current first aid, CPR, and Bloodborne Pathogen (BBP) certification cards, except in emergencies where human life is threatened.

Saw training, certification, safety equipment, and supervision for the non-fire environment is not standardized by national federal policy but varies greatly from the USFS, the NPS and the BLM. The PCTA Saw Training Program adheres to the Forest Service Health and Safety Code Handbook section 22.48 (FSH 6709.11) standards for saw operations. The FSH 6709.11 is recognized as one of the best available industry standards for non-logging chain and crosscut saw operations. The standards also tier to Section 1910.266 Logging Operations requirements from the Occupational Safety and Health Administration (OSHA) for establishing an effective safety program for logging operations. These include instructions for selection and use of personal protective equipment and requirements for first aid, CPR, and Bloodborne Pathogen (BBP) certification.

The PCTA Saw Training and Certification Program utilizes the USFS Missoula Technology and Development (MTDC) Center's Chain Saw and Crosscut Saw Training Course Guidebook (Tech. Rep. 0667-2805 [Student] and 2804 [Instructor]) as the basis for chain and crosscut saw operator training in a non-fire environment. The appropriate sections of the MTDC's Saws that Sing (0423-2822) are also utilized for crosscut saw training.

The PCTA endorses the partner agencies' approach to the administration of their respective employee worker-safety programs and joins with those agencies in the administration of safety programs to protect staff and volunteers working on the PCT. The PCTA appreciates and supports programs that protect volunteers under the Volunteers in the Forests Act (VIF), the Volunteers in the Parks Act (VIP), and the BLM's Volunteers for the Public Lands (VPL) sponsorship of training and safety programs. The PCTA will maintain current Volunteer Service Agreements with their federal agency partners including an agreement for Volunteer Saw Instructors. These agreements outline any applicable medical coverage and tort-protection for incidents on the PCT arising from volunteer activities there.

The PCTA recognizes that, under the VIP, VIF and VPL programs, volunteers are considered "federal employees" for the purposes of medical and tort-claims protections. However, the PCTA maintains that its organization and its individual volunteer workers are independent citizens working under private PCTA auspices within the law, regulations, and policies set by the federal agencies.

While the PCTA Saw Training and Certification Program is designed to ensure that all saw operations under the auspices of the PCTA are conducted in a manner that maximizes protection of saw operators, other members of the crew and the general public from accidental injury, illness or death, it is recognized that individual PCTA staff and volunteers have primary responsibility for their own personal safety and for compliance with the requirements for chain and crosscut saw operators. Each staff person and volunteer engaged in PCTA-sponsored maintenance and construction activities assumes personal responsibility for following volunteer crew leader, or PCTA or agency staff directions, assessing his or her own physical condition and preparedness for engaging in trail-work activities, and coming properly equipped and clothed in a manner appropriate for the location, duration, weather conditions, and proposed work.

Safety and training is continually emphasized by the PCTA and its Saw Training and Certification Program. Recognizing that emphasis, the PCTA requires each prospective student complete a Saw Training and Certification Course Application and screens the applications to ensure student have sufficient aptitude to attend the training and certification course. Students may be required to have additional field training based on their skill level.

The direction in the following sections sets forth specific responsibilities of the PCTA and its Volunteer Saw Instructors to ensure safe and effective management of the PCTA's Saw Training and Certification Program. It also establishes requirements for Volunteer Saw Instructor training and certification; saw operator responsibilities, and requirements for training and certifications; requirements for monitoring saw operations and accident reviews; and provides a list of documents and media supporting the PCTA's Saw Training and Certification Program.

Pacific Crest Trail Association Responsibilities

The PCTA's responsibilities are to:

1. Administer the PCTA's Saw Training Program ensuring volunteers comply with prescribed practices and procedures. The PCTA will develop a cadre of Volunteer Saw Instructors to meet its saw training and certification needs. Volunteer Saw Instructors may include PCTA staff.
2. Maintain current Volunteer Service Agreements with their federal agency partners including an agreement for Volunteer Saw Instructors. These agreements outline any applicable medical coverage and tort-protection for incidents on the PCT arising from volunteer activities there.
3. Authorize PCTA staff, members and active volunteers to operate chain and crosscut saws by issuing PCTA saw certification cards.
4. Accept and recognize as valid the certifications of chain and crosscut saw operators including those trained by USFS, NPS, and BLM instructors.
5. Maintain records of trainings and certifications conducted by PCTA Volunteer Saw Instructors. The PCTA will also maintain a list of PCTA-sponsored volunteers certified as sawyers outside of their program. The PCTA will comply with requests from agency partners for copies of saw training and certifications records, documents, and reports.
6. Reimburse approved Volunteer Saw Instructors' for pre-approved expenses for travel to and from PCTA-sponsored training courses and purchases.
7. Conduct annual meetings for Volunteer Saw Instructors to address new technology, safety, and program implementation concerns.
8. Provide Volunteer Saw Instructors with training course materials, supplies and equipment to the fullest extent possible.
9. Coordinate with staff, local agency units and Volunteer Saw Instructors to schedule and conduct saw training courses.
10. Provide required personal protective equipment, tools, and supplies to PCTA saw operators for conducting safe saw operation projects to the fullest extent possible.
11. Work with agency partners to investigate any reported violations of safety or procedure policies, conduct after action reviews, and maintain safety and accident reports of all saw operations.
12. For safety or serious procedural violations, review recommendations for and execute the removal of Volunteer Saw Instructor and saw operator certifications. Ensure the saw cards are revoked when the qualifications of a volunteer are no longer considered adequate. This decision may be made at any time.

13. Review and update the Saw Training Program and supporting documents on an annual basis as needed.

Volunteers Saw Instructor Responsibilities

The PCTA's Volunteer Saw Instructor's (VSI) responsibilities are to:

1. Maintain valid First Aid, CPR, and Bloodborne Pathogen (BBP) certification cards.
2. Maintain current knowledge of policy and regulations pertaining to saws and related equipment. Instruct only in bucking activities using USFS-approved techniques and equipment.
3. Use only the techniques and equipment for which they have been trained, qualified, and are currently certified to use.
4. Comply with agency requirements on emergency communications and provide for the ability to call for assistance. Agency Job Hazard Analyses for saw operations outline the need for sawyers to be able to call for assistance and render aid. No work is authorized to occur without appropriate communications devices, and Emergency Action and Trailhead Communication Plans in place.
5. Assist PCTA staff in implementing and monitoring on-the-ground saw operations and activities as well as scheduling and conducting saw training courses.
6. Assure all equipment used in training courses is maintained to "maximize its performance and safety."
7. Conduct saw training courses for saw students, as outlined in the Saw Operator Training section. Upon completion of all required training, confirm that a volunteer has demonstrated the attitude, knowledge and aptitude for saw operations and has demonstrated the skill to be qualified at a given certification level by completing a field evaluation form and sign saw certification cards.
8. Submit all training course paperwork (quizzes, evaluation forms, and project report) to PCTA Trail Operations Manager at the Sacramento office within one week of conducting a saw training course.
9. Attend annual safety meetings, tailgate safety sessions or conference calls as needed.
10. Work directly with the PCTA Trail Operations Manager to suspend or revoke any saw operator's certification for safety or serious procedural violations.
11. Submit reports for all occupational injuries, illnesses, and fatalities, for saw operating volunteers to the PCTA Trail Operations Manager within 24 hours of incident.
12. Receive written pre-approval by a local agency when conducting saw training and field evaluations for non-PCTA persons. Such trainings are outside the scope of the PCTA's MOU and must be pre-approved. A local agency certification card will be issued and the local agency official will be the "Authorizing Official" on the certification cards.

Volunteer Saw Instructor Training

Volunteer saw operators who are in training to become Volunteer Saw Instructors will be referred to as Volunteer Saw Instructors-In-Training or VSI-In-Training. Qualifying PCTA staff will also be considered for becoming Volunteer Saw Instructors.

Volunteer saw operators who demonstrate the following qualifications will be considered for VSI-In-Training Program:

1. Commitment to meet the expectations of the PCTA and its agency partners.
2. Previous certification as a PCTA Saw Operator or agency-equivalent “B” level sawyer.
3. The ability to teach in the classroom and to conduct bucking field evaluations.
4. Knowledge and skills of supporting saw tools and accessories for bucking.
5. Effective communication skills, the ability to transfer and relate concepts to others, and the ability to alter training methods to fit the environment and student group.
6. The ability to recognize unsafe saw bucking operation situations and take control when needed.
7. Attitude, knowledge and aptitude for saw operation and have demonstrated the skill to be qualified as a VSI.

VSI-In-Training shall complete the PCTA’s “VSI-In-Training Task Booklet,” including the following tasks:

1. Successfully completed all required tasks with approving signatures within two calendar years from initial sponsorship date.
2. Be sponsored by a current PCTA VSI, or qualified PCTA or agency staff. Contact PCTA’s Trail Operations Manager with your current contact information.
3. Successfully co-organize one or more saw training courses under the supervision of a PCTA VSI or qualified PCTA staff.
4. Successfully prepare and submit the necessary paperwork for two or more saw training courses under the supervision of a PCTA VSI, or qualified PCTA or agency staff.
5. Successfully co-instruct one saw training course (both classroom and field evaluations) under the supervision of a PCTA VSIs or qualified PCTA staff.
6. Successfully instruct one saw training course (both classroom and field evaluations) under the observation of an USFS Regional Lead Saw Coordinator, Regional Safety Officer, or Forest Lead Program Saw Instructor and receive their signature of approval for VSI certification.

Volunteer Saw Instructor Certification and Re-Certification

Completion of a VSI-In-Training Task Booklet by an individual is not a guarantee of VSI certification. The Task Booklet must contain the approving signature of an USFS Regional Lead Saw Coordinator, Regional Safety Officer, or Forest Lead Program Saw Instructor, who observed and approved of a training, both classroom and field evaluations, conducted by the VSI candidate.

Upon signed approval from an USFS Regional Lead Saw Coordinator, Regional Safety Officer, or Forest Lead Program Saw Instructor in a VSI-In-Training Task Booklet. The PCTA Trail Operations Director and/or Trail Operations Manager will issue a VSI certification card.

VSI certifications are valid for three years. When the card expires, the volunteer will need to be evaluated for re-certification. Re-certification evaluation will consist of a VSI or qualified PCTA staff person and an USFS Regional Lead Saw Coordinator, Regional Safety Officer, or Forest Lead Program Saw Instructor, observing and approving of a training conducted by the candidate and conducting a field evaluation of the candidate's saw operating skills.

Crosscut Saw Assistant Responsibilities (“second person on the saw”)

1. Receive on-the-job saw safety training during the project tailgate safety session and through review of the project Job Hazard Analysis.
2. Operate only under supervision of a qualified Saw Operator, VSI or agency B or C level sawyer.
3. Assure all safety procedures, including use of required personal protective equipment, are followed during any saw operation project and by all participating volunteers.

Trainee Saw Operators Responsibilities

1. Maintain valid First Aid, CPR, and Bloodborne Pathogen (BBP) certification cards.
2. Operate only under supervision of a qualified Saw Operator, VSI or agency B or C level sawyer.
3. Perform bucking work only at the level described by their current certification with either a chain or crosscut saw.
4. Use only the techniques and equipment, which they have been trained, qualified, and are currently certified to use.
5. Assure all safety procedures, including use of required personal protective equipment, are followed during any saw operation project and by all participating volunteers.

Saw Operator Responsibilities

1. Maintain valid First Aid, CPR, and Bloodborne Pathogen (BBP) certification cards.
2. Perform bucking work only at the level described by their current certification with either a chain or crosscut saw.
3. Use only the techniques and equipment, which they have been trained, qualified, and are currently certified to use.
4. Assure all safety procedures, including use of required personal protective equipment, are followed during any saw operation project and by all participating volunteers.
5. Comply with agency requirements on the ability to call for assistance. Agency Job Hazard Analyses for saw operations outline the need for sawyers to be able to call for assistance and render aid. No work is authorized to occur without appropriate communications devices, Emergency Action Plans and Trailhead Communication Plans in place.
6. Assure all safety equipment is maintained and in operational condition. Report any equipment failures or needed repairs to the PCTA Regional Representative.
7. Determine if their bucking skill level is adequate to attempt a cutting situation using the “Go or No Go” methodology. If a sawyer decides not to attempt a particular cutting situation, they need to report it to the PCTA Regional Representative as soon as possible.
8. Report any safety violations during saw operations projects to the PCTA’s Trail Operations Manager as soon as possible.
9. Provide oversight and training to Trainee Saw Operators.
10. Direct and instruct an assistant when using a two-person crosscut saw. At least one member of a crosscut saw team must be fully qualified for the level of work.

Training

Classroom and field instruction will be conducted by a VSI, VSI-In-Training, or certified PCTA or agency staff. PCTA's "Training Course Checklist" and will be used to provide a list of items required to facilitate a saw training course.

Initial training and certification for Trainee Saw Operators and Saw Operators will meet USFS agency requirements and include the following as needed for either chain or crosscut saw training:

1. Four hours devoted to classroom training. It will include a review of PCTA and USFS policy and procedures, proper maintenance and care of saws, and safety requirements. Classroom material will include:
 - a. Appropriate sections of the most current version of the following:
 - i. USFS Health and Safety Code Handbook 6709.11
 - ii. MTDC's Chain Saw and Crosscut Saw Training Course Student Guidebook
 - iii. MTDC's Saws That Sing (crosscut saw training only)
 - b. PCTA's Saw Safety for Volunteers PowerPoint
 - c. PCTA's Bind Analysis and Cut Sequence PowerPoint
 - d. PCTA's Volunteer Crosscut Saw Training Program PowerPoint
 - e. PCTA's Volunteer Chain Saw Training Program PowerPoint
 - f. PCTA's "Go or No Go?" handout and wallet card
2. Twelve hours devoted to field training and evaluation. It will focus on hands-on operation and demonstrated proficiency in brushing and bucking of material. Field training material will include:
 - a. PCTA's Field Evaluation Form
 - b. Appropriate Job Hazard Analyses
 - c. PCTA's Volunteer Sign In Sheet
 - d. PCTA's Trailhead Communications Plan
 - e. PCTA's Emergency Action Plan

Initial training and field evaluation times may be modified, reduced or increased as determined by the instructors, based on previous experience and field examination of the students.

Additional field training may be required by the instructor based on previous experience and field examination of trainee. VSIs only certify for bucking and have complete authority to restrict the certification of Trainee Saw Operators and Saw Operators as appropriate to their skill and physical ability.

Trainee Saw Operators wishing to advance to Saw Operator will need to successfully complete and pass the two-day certification training and field evaluation.

Saw Operator recertification training will be conducted by a VSI, VSI-In-Training under the supervision of a VSI, or certified PCTA or agency staff. PCTA's "Training Course Checklist" will be used to provide a list of items required to facilitate a saw training course.

Students with a current agency-issued or PCTA certification card will be eligible for recertification training.

Recertification training for both Trainee Saw Operators and Saw Operators will meet USFS agency requirements and include the following as needed for either chain or crosscut saw training:

1. Two hours devoted to a classroom or tailgate session training. It will include a review of PCTA and USFS policy and procedures, proper maintenance and care of saws, and safety requirements. Classroom material will include:
 - a. Appropriate sections of the most current version of the following:
 - i. USFS Health and Safety Code Handbook 6709.11
 - ii. MTDC's Chain Saw and Crosscut Saw Training Course Student Guidebook
 - iii. MTDC's Saws That Sing (crosscut saw training only)
 - b. PCTA's Saw Safety for Volunteers PowerPoint
 - c. PCTA's "Go or No Go?" handout and wallet card
2. Two hours devoted to field training and evaluation. It will focus on hands-on operation and demonstrated proficiency in brushing and bucking of material. Field training material will include:
 - a. PCTA's Field Evaluation Form
 - b. Appropriate Job Hazard Analyses
 - c. PCTA's Volunteer Sign In Sheet
 - d. PCTA's Trailhead Communications Plan
 - e. PCTA's Emergency Action Plan

Recertification training times may be modified, reduced or increased as determined by the instructors, based on previous experience and field examination of the students.

Additional field training may be required by the instructor based on previous experience and field examination of trainee.

Certification

All saw operators shall maintain valid First Aid, CPR, and Bloodborne Pathogen (BBP) cards.

All saw operators are not necessarily expert users of chain or crosscut saws.

Participation in a saw training course by an individual is not a guarantee of certification. VSIs only certify for bucking and have complete authority to restrict the certification of Trainee and Saw Operators, including restrictions on projects, functions, and material size, based on demonstrated performance. Limitations refer to saw operations and/or size such as “limbing only,” “brush cutting only,” or “less than 24 inches.”

Each saw operator who successfully completes the course requirements and passes the field examination will receive a saw operator’s card. The VSI shall sign the “Approving Instructor” block. The PCTA’s Trail Operation Director or Trail Operations Manager shall sign the “Approving Official” block.

Trainee Saw Operators are restricted to the restriction provided on their saw card and to work under the supervision of a currently certified PCTA Saw Operator, VSI, or agency certified B or C Level sawyer. Operators at this level may perform at the Saw Operator, as a Trainee under supervision of a currently certified PCTA Saw Operator, VSI, or agency certified B or C Level sawyer.

Saw Operators are restricted to the restriction provided on their saw card.

Certification Duration

Saw operator certification is valid for the following amount of time:

1. Trainee Saw Operators certifications and re-certifications are valid for no longer than one year from the date of issue.
2. Saw Operators certifications and re-certifications are valid for no longer than two years from the date of issue.

When the certification card expires, the individual must be field tested and re-certified.

Monitoring Saw Operations

Monitoring is critical to the prevention of saw accidents.

PCTA, VSIs and Saw Operators are to observe saw use in the course of daily activity reviews or other periodic inspections to ensure that volunteers are using acceptable procedures for saw operations. The evaluation procedure may involve the following:

1. Reviewing operator's current certification level and, if needed, the training records to ensure that operator is cutting within current qualifications.
2. Reviewing methods and operator's understanding of cuts and their relationship to each other, supporting equipment, escape routes, and other critical points of saw use.
3. Reviewing use of personal protective equipment.
4. Reviewing of Job Hazard Analysis review, safety, and tailgate meetings.
5. Taking corrective actions if any unsafe practices are observed.
6. Reviewing supervision and instruction of operators who are in training status or who have a restricted operation.
7. Reporting results of review and recommendations to the PCTA.

Accidents and Near Miss Reviews

After accident or near miss reviews are critical to understanding and preventing of saw accidents.

For all occupational injuries, illnesses, and fatalities, saw operating volunteers will follow instructions in the PCTA's Volunteer Injury Packet with the addition of submitting USFS R6-FS-6700-03 "Saw Incident Report" within 24 hours of incident.

The accident policies and responsibilities for investigation lie with the agency where the sponsored volunteer work was occurring under agreement at the time of the incident. If no agency policy exists, PCTA will conduct an investigation.

The PCTA will notify the USFS PCT Program Manager and PCTA Executive Director if one of the following situations occurs:

1. One or more volunteers suffer severe or fatal injuries or severe illness;
2. Accidental property damage of \$5,000 or more; or
3. Release of a reportable quantity of a hazardous substance into the environment.

Supporting Documents and Media

Administrative

1. PCTA Saw Training and Certification Program Policy
2. Volunteer Saw Instructor-In-Training Task Booklet
3. Student Application
4. Training Course Checklist
5. Footwear for Volunteer Sawyers
6. Saw Incident Report Form

Classroom Material - General

7. MTDC Student Guidebook
8. Saw Safety for Volunteers PowerPoint
9. Bind Analysis and Cut Sequence PowerPoint
10. "Go or No Go?" Handout – yellow paper
11. "Go or No Go?" Laminated Card – Avery 5392

Course Material - Chain Saw Only

12. Chain Saw Training Overview
13. Chain Saw Training Schedule
14. Chain Saw Tools Checklist – green paper
15. Chain Saw Training PowerPoint
16. Chain Saw Initial Certification Quiz
17. Chain Saw JHA (USFS approved)
18. Chain Saw Qualification Card – Avery 5371

Course Material – Crosscut Saw Only

19. Crosscut Saw Training Overview
20. Crosscut Saw Training Schedule
21. Crosscut Saw Tools Checklist– green paper
22. Crosscut Saw Training PowerPoint
23. Crosscut Saw Initial Certification Quiz
24. Crosscut Saw JHA (USFS approved)
25. MTDC Saws that Sing
26. Crosscut Saw Qualification Card – Avery 5371

Field Materials

27. Field Evaluation Form – Rite in the Rain Paper
28. Training Evaluation Form