



Field Leadership Guide



Recruiting Volunteers
and Basics of Project
Planning

Field Leadership Training Manual



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An Introduction to the Training Modules in this Learning Series

The three modules of the Field Leadership series are:

- Recruiting Volunteers and Basics of Project Planning
- Leading a Field-Based Volunteer Experience
- Trail Supervisor Development

The modules are intended to be complementary and not mutually exclusive. Modules may be presented separately or as a series.

The first two modules relate, as illustrated below.

Work-Trip Planning Alignment with Curriculum

Activity	Prior to Event Start				Host Activity	After Event 1-5 Days
	2 Mo.	45 Days	5-7 Days	3-5 Days		
Identify Project; Site Visit						
Craft Invitation; Recruitment; Post event for Volunteer Sign-up						
Follow-up with registrants; Respond to inquiries						
Remind volunteers of activity; purchase food; gather supplies						
Host the activity						
Report work accomplished						

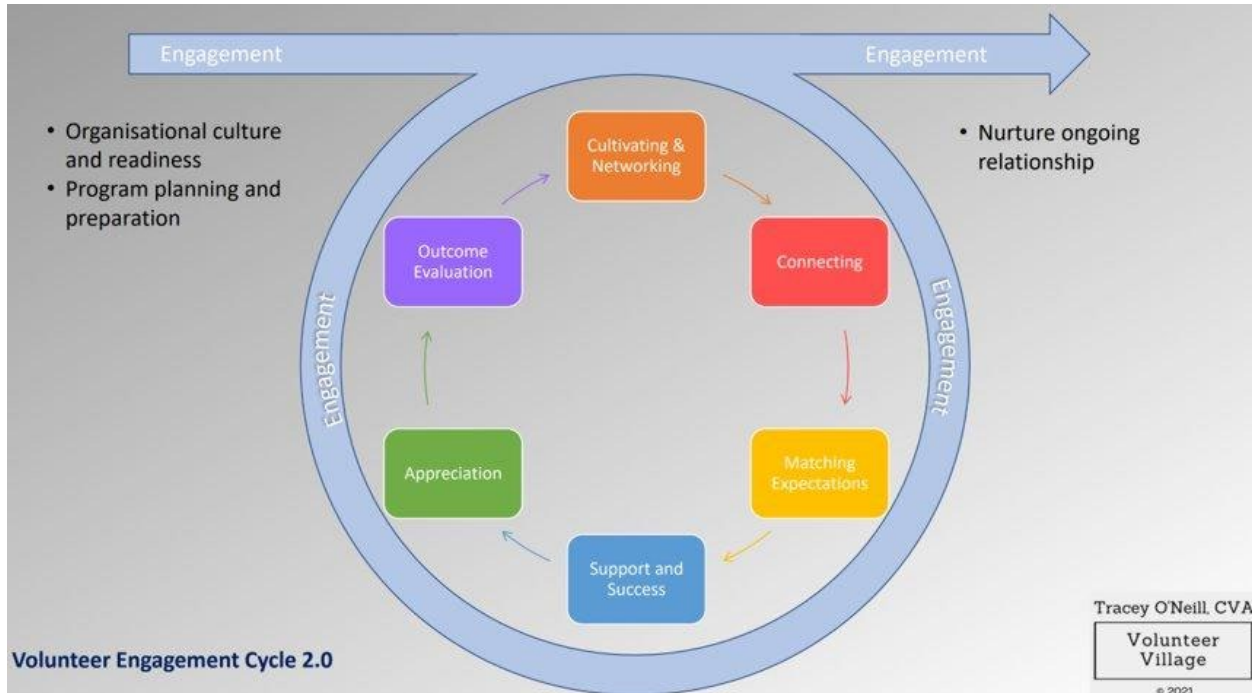
Grey=Recruiting Volunteers and Basics of Project Planning

Blue=Leading a Field-Based Volunteer Experience



Volunteer Engagement Basics

Learning Outcomes: Successful volunteer administration begins with a clear framework within your organization for volunteer engagement.



The success that organizations have in volunteer recruitment is proportional to the system they have in place for a complete engagement cycle for the volunteer experience. Tools that assist with the steps in the above system include position descriptions to support recruitment and set expectations with placements, work plans that describe what will be accomplished, necessary training and support, as well as an evaluation rubric that can help the leader and/or the organization improve the experience.

Recruitment

Recruitment is comprised of how you find prospective volunteers (communication channels) and what you tell them (message/invitation). Recruitment channels can include the following methods. Each has different benefits and limitations.

Website -- Organizational Web-Page(s): This method relies on websites being optimized for search engines so that prospective people utilizing key words have a better chance of finding your site.

Social Media: This method produces the best results when efforts to post and content messages are dependably consistent. Compelling images coupled with perky, distilled text does well.

Personal invitation / word-of-mouth: This is a powerful resource that provides time to discuss

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opportunities in more depth and respond in real-time to perceived obstacles. Invitations may come from existing volunteers to friends, or representatives tabling at community events.

Cross-Promotion Locations for Volunteerism: Posting volunteer opportunities on a variety of digital volunteer “boards” helps reach a bigger audience. The Volunteer Engagement Platform (www.appalachiantrail.org/waystovolunteer) receives more than 16,000 unique views annually, and the organization sends a monthly email about events to 7,000 subscribers. Other volunteer event aggregator sites include VolunteerMatch.com, Nature Groupie (in the Northeast), and AARP. Local service agencies such as Hands On entities or United Way organizations may also have ways to post opportunities.

Printed material: Flyers with QR codes offer a streamlined approach to printed material with a longer shelf-life than a tri-fold brochure since the destination landing page can be more quickly modified. Flyers may promote specific events or volunteerism with your organization generally. In addition to being a tabling resource at in-person events, they can be posted in community shops/restaurants, or area visitor centers.

Partner with Intact Groups: This approach requires more advanced project planning, since the project selection should hold meaning for the partner group. The benefit of partnership is exposure of A.T. stewardship to more people while leaning into the entity’s social capital and esprit de corps.



Best Practices for Welcoming in Advance

Learning Outcomes:

- Familiarity with volunteer motivations.
- Understands purpose and necessary components of a position/event description.
- Appreciates the value of essential eligibility criteria to help people determine suitability.
- Able to list the benefits of a volunteer liaison outreach in advance of activity.
- Ability to craft invitations for new participants.

Volunteer Motivations and Incentives

Motivations are internal to a person. These are the needs and wants that drive behavior.

Incentives are external factors that may influence a decision based on motivation.

The two work together.

Motivations	Incentives
<ul style="list-style-type: none"> ● (The project) is of personal importance ● Being associated with the credibility of the organization providing the experience ● Social (making new connections or bringing friends/family) ● Worthwhile experience with meaningful importance ● Learn something new (e.g. job training, apply existing skills to new activity) ● Repeatable ● Connection to a place and its improvement ● Enhanced sense of self (e.g. positive mood, brings joy) ● Physical activity 	<ul style="list-style-type: none"> ● Activity is easily discoverable online. ● Able to immediately sign-up. ● Scheduling suits availability ● Impact / what difference your participation makes ● Seeing people who look like me are also participating ● Tangible reward ● Activity adaptable to your skills or background.



Activity Sheet: Volunteer Motivations

Activity: Rank your Motivation

Review the volunteer position description(s) below. What motivates you to want to contribute to this activity? Rank your top three motivations.

Activity Name:	Motivations to participate in the activity.	Activity Name:
Ranking		Ranking
	Personal importance / local importance <i>"It's important to address this issue in my community."</i>	
	Credible (org providing opportunity has expertise) <i>"It would be so cool to help this organization do XYZ"</i>	
	Social <i>"I might meet folks with similar interests." "I can bring a friend or family with me to do this."</i>	
	Authentic/ worthwhile experience <i>"I see how I can make a meaningful difference."</i>	
	Repeatable <i>"If I like this, I can keep doing this every {day of the week/month}."</i>	
	Connection to place <i>"I enjoy the activity that this opportunity supports."</i>	
	Enhanced sense of self <i>"This could be fun!"</i>	
	Physical activity <i>"Great alternative to the gym!"</i>	

Activity Sheet Resource: Position Descriptions

1. Parking assistant

Help direct traffic to available parking and enjoy The Band's show on us! Seeking volunteers to work Noon to 4 p.m. on Saturday (DATE) to help visitors to have a smooth arrival and keep the chill-vibe flowing pre-show for Riverlink's Fundraiser that supports cleaning our waterways. As a friendly face of the event, you will greet visitors, provide directional information, and set the



tone for their visit. Physical requirements include standing for long periods of time in unpredictable weather. Though we've sent in our request for sunshine that shouldn't stop you from bringing your umbrella! We'll provide your safety vest.

2. Trail maintenance

Spend a fun and rewarding day caring for 2 miles of the XYZ trail in beautiful Blowing Rock township. The planned work includes cutting back vegetation growing into the trail, opening drains, and generally making the trail a better place to hike or bike. Participants need to wear long pants and sturdy boots and pack lunch, plenty of water, rain gear (just in case), and work gloves if you have them. Training and tools are provided for this full-day experience outdoors where you get in a light workout (- always better than the gym -) and meet other people who like spending time in nature. The workday is 9 a.m. – 2 p.m. on (DATE). Expect to hike up to 4 miles over uneven terrain, while wearing a daypack and hand-carrying a tool.

3. Stock shelves at food pantry

Help keep the shelves of the food pantry filled and easy to navigate. Battling food insecurities requires the local food pantry volunteers to be able to access their food inventory with as few obstacles as possible. Exercise your brain and deploy your organizational skills to make this mission possible. Seeking food-stocking volunteers who can commit to 3 2-hour shifts per week. Physical activities require sanding and walking for long periods of time and lifting at least 35 pounds while working in an indoor environment.

4. Reading Friend

Children become better and more avid readers when they're read to as youngsters. Share the joy of reading stories to children ages 4-8 at Sunshine Elementary School. Share well-loved childhood stories to bring imagination to life, brighten the lives of children in your community, while sharing stories that model kindness, empathy, generosity, and friendship. "Reading Friend" volunteers are sought 3-days a week for 45-minute sessions. Before beginning, volunteers receive a 3-hour training and must pass a standard state background check. To read, volunteers may either sit on the floor, or a chair, but should be able to sit for up to an hour.

5. Community Beautification

Love where you live? Join us for a Community Appreciation Day-of-Service. Volunteer activities include litter clean-up and planter box weeding and planting flowers, so you can continue to bask in the beauty of our community. Volunteering is a proven way to improve well-being and foster happiness. Bring a friend or your family and spend the morning with us on (DATE) to make a difference. We'll follow-up with a picnic furnished by The BBQ Joint; vegan options available. Tasks are available for all abilities, but all activities will be outdoors, so dress accordingly. We'll provide the materials for all volunteer activities and issue assignments for beautification work. If you have reduced mobility, please contact us in advance if you may need an activity modification.

6. Citizen-Science Water Monitoring

Bring your curiosity about the natural world and your organizational skills to help track water quality and aquatic invertebrates at priority sites. This work directly assists scientists in their study of ecosystem integrity and tracks trends in climate change impacts. Contribute to the collection of this important data within your personal schedule and at your own pace. Physical

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requirements include walking and kneeling in order to complete the project. Training of monitoring protocols will be offered, and some data organization using a computer is necessary.



Welcome In Advance: A Welcome Wagon

Getting someone to express an interest in volunteering on the Appalachian Trail is the first step to their volunteer engagement journey. Ensuring they follow through on their commitment is the next step, and what you do as a volunteer coordinator matters.

The Appalachian Trail Conservancy (ATC) recommends that all organizations coordinating volunteers have a “welcome wagon” to support new volunteers’ interest in events. Whether you call it a “welcome wagon” or a [volunteer liaison](#), the intent is to cultivate a positive relationship with a person who has signed up so that they feel comfortable and valued in their decision to volunteer. This moves the registration process from the digital space to the human dimension by allowing a new volunteer to have contact with someone they are going to see once they show up.

Here are some things to include when following up on a new volunteer’s registration:

- Make a personal connection, let them know you’re ready to help them have a positive experience and that you’re looking forward to meeting them on X date.
 - This reminder creates some accountability between the registrant and you. If they can’t come for some reason, they should contact you.
- Remedy any questions or concerns about volunteering by answering questions they have about gear, event timing, or other personal preparation.
- Let them know any information that wasn’t provided initially, for example if they need specific directions to a meeting location.
- Confirmation that the individual’s interests, skills, and experience align with the expectations of the volunteer role may also be helpful at this point.
 - If expectations do not align, then a warm welcome could also look like directing the individual to an alternative volunteer opportunity that may be more suitable for them.

Ideally, proactive outreach to new volunteers occurs by phone because it fosters a conversational atmosphere. Otherwise, a highly customized, personal, email based on what you know about the person so far, helps establish an authentic interest in the individual within the enthusiastic welcome message that provides ample information.

The field leader should be sure new participants receive a welcome in advance, but they do not necessarily need to do the outreach. The outreach could be performed by someone who attends regularly who will be on hand to greet new attendees, or a volunteer liaison for the organization.

Welcome In Advance: Reminder Email

A reminder email sent 3-5 days prior to a volunteer activity is a best practice to affirm commitments, and manage the roster if any cancellations occur, so that you can extend invitations to anyone on a waitlist. The reminder email will reiterate fundamental information for the activity, including what to wear and pack, expected weather conditions, where to meet, as well as reiterate what to expect. The email should include who will send cancellation information if weather-related conditions occur and how far in advance of the event volunteers will receive those details. Providing a cell phone number for

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the activity leader is also a good idea, if the meeting location has cellular reception. If it doesn't, that is also good information to provide in the email.

Tip: As a best practice, when emailing a group of participants before or after events to use the "BCC" line rather than "To" or "CC" to protect individuals' personal information.



Sample Position Description: Volunteer Liaison

The Appalachian Trail (A.T.) is cared for by thousands of people, hundreds of organizations/agencies, and passes through a variety of diverse landscapes. Volunteers, coordinated in large part through A.T. Clubs, provide on-the-ground knowledge, experience, and operational capacity. Alongside a variety of partners, volunteers work together to manage and protect a long-distance hiking trail that connects a patchwork of conserved lands and communities along a massive migration corridor that exits along the spine of the ancient Appalachian Mountain range.

The purpose of the Volunteer Liaison is to foster connections between the Appalachian Trail, {{Club Name}}, a community of hikers, nature-lovers, and adjacent community members. This position serves to:

1. Build stronger connections between your clubs' scheduled volunteer activities and the broader hiking community, neighboring areas, and potential volunteers.
2. Bring additional capacity for volunteer engagement by promoting club volunteer events and open position to the Appalachian Trail Conservancy's Volunteer Engagement Platform, and other cross-promotion platforms.
3. Assist your club with marketing and communications in elevating awareness for and participation in volunteerism.
4. Support bridging different generations of volunteers by being a connector of people at projects events.

Responsibilities:

- Work with club activity leaders and the club volunteer engagement leader to collect information on upcoming A.T. events.
- Convey event details through electronic and digital channels for promotion.
- Recruit volunteers by raising public awareness for the A.T. club in local and regional networks.
- If assigned by activity leader, serve as the 'welcome wagon' to connect with new volunteers after initial signup to welcome them, answer questions, and set expectations.
- Draft social media posts, newsletter content, or other stories to capture the importance of specific work accomplished, or volunteerism specifically. Share to Club media managers/editors and ATC.
- Connect with volunteers on projects by supporting their pursuit of education, training, communication, or mentoring.
- Support field leaders by being a club ambassador for events by:
 - Providing a welcome to volunteers at the Trailhead. Introduce people and spark opportunities for deeper connection.
 - Joining the crew at worksite as a participant, if possible. If that's not possible, you may set up post-work trip refreshments to greet the crew on their return.
 - Take or collect photos of participants during the scheduled activities to share with the community at large or in follow up reports to participating volunteers.
 - Socialize with volunteers throughout the work-trip, support group cohesion and morale.
 - Support opportunities for volunteer feedback.
- Ensure follow-up with new volunteers with a written report on the days' activities providing a thank you to volunteers explaining the importance of their work. Ask participants to share their

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accomplishments to their communities and invite a friend to join them on their next activity with the {club}.

- Other Duties, as schedule permits, or as assigned.

Term:

This is a 2-3 year position with the option to extend the position duration if desired. Each project requires 3-5 hours over 2 months, plus any participation in the event as an ambassador. Volunteer Liaisons may undertake more than one project at a time, based on their availability.

Benefits:

- Undertake projects as Volunteer Liaison when it suits your availability. Tasks may be completed on a flexible schedule.
- Support club activity leaders, new volunteers, and existing volunteers to have positive experiences.
- Gain a better understanding of trail maintenance and ecological preservation.
- Spend time in nature.
- Pride in being an essential part of maintaining the volunteer legacy of the A.T.
- Opportunities for published work on the story of the A.T.
- Exposure to career development opportunities and networking in the field of conservation.

Available Training & Resources:

- Technical advice from ATC's Volunteer Development Coordinator
- Partner [resources for volunteer coordination](#)
- [Welcoming New Volunteers](#) resource
- Training on cross-promotion of events to ATC's Volunteer Engagement Platform

Qualifications:

- Skilled communicator, with reliable email communications.
- Excellent social media skills.
- Understanding or willingness to learn about trail maintenance and ecological preservation.
- Ability to learn about the different kinds of volunteer activities and respective safety equipment.
- Willingness to learn, follow, and teach the appropriate work standards, techniques, and safety procedures.
- Familiarity with the A.T. preferred, but not required.
- Capable of hiking over variable terrain, in changing weather conditions preferred, but not required.

Requirements:

- Willingness to furnish photo publication rights to the organizational partners, for use in print and online.
- Familiarity with word processing programs, web technology, and Google Drive platforms.

If interested in this volunteer position, please contact the {{Club Name}} for more information. Feel free to reach out to the ATC at volunteer@appalachiantrail.org for assistance with connecting to the club.



Volunteer Events Invitations and Position Descriptions

Inviting volunteers to participate in an activity should initiate excitement, share how the work is meaningful and important, describe the kinds of tasks that individuals will be doing, the benefits to the participant, as well as any physical or cognitive requirements. Prospective volunteers should be able to comprehend exactly what is expected of them from the description. Volunteer event invitations and position descriptions share similarities but have distinctions, beginning with what takes priority in the listing.

One-Time Event Invitation	(Ongoing) Volunteer Position Description
<ul style="list-style-type: none"> ● Location ● Date(s) ● Start and end time ● Activity description ● Why the activity is important ● What is expected of the volunteer; What tasks are available. ● What to wear and bring, as well as what is provided by event host. ● What are the benefits to the volunteer ● Who does the volunteer contact if they have more questions. ● How and when is notice communicated if the event is canceled or rescheduled. ● When applicable, any specific experience required to participate. ● Sign-up form/link 	<ul style="list-style-type: none"> ● Big-picture introduction to the purpose of the role and benefit to the organization ● An action-oriented list of activities or responsibilities of the position. ● Experience or qualifications needed ● Details on available training or support for the role. ● Benefits to the volunteer ● Time commitment (likely term, estimates of weekly or monthly hours) and degree of scheduling flexibility. ● Information on applying

Event invitations that include an accompanying image can offer additional inspiration to participate. Imagery of people having a good time and feeling satisfied conveys a great deal to how people consider a project. Cleave to the maxim “faces not backsides” for your photo selection since photos that show the physical act of field work may be from behind. Find more recommendations on taking photos that make good material to promote future events here: <https://appalachiantrail.org/register-blog/picture-perfect/>.

The remainder of this section focuses on hosting volunteer events.

Event Invitations: Essential Eligibility Criteria

Essential Eligibility Criteria (EEC) are the minimum physical and cognitive requirements required for an activity. They set expectations in order to help applicants “self-select.” They are a screening tool to provide fair assessment of all applicants. They are central to risk management, and foster an equitable,

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diverse, and inclusive space. All prospective participants must meet the EEC requirements with or without a reasonable modification.

Questions for your organization to consider:

- Does your organization adequately list essential criteria for planned tasks on activities?
- What constitutes an “undue burden”, a “fundamental alteration”, and a “safety threat” for each program?
- What are the decision rules to determine if and when this might be compromised? Who makes that final decision?

Event Invitations: [Working with Youth](#)

If event tasks can accommodate contributions from youth, be sure to include this information in the event invitation. Be clear if there is a minimum age requirement, whether youth must be accompanied by a parent/guardian. Indicate if advanced paperwork is necessary.

Event Invitations: [Screening Volunteers](#)

Please see the section of the manual on the value of a Welcome Wagon and how a welcome in advance is the opportunity to align expectations and assure readiness.



Project Logistics for Volunteer Event Success

A project need is not the same as a “shovel ready” project.

Once a project is defined, it needs planning. Planning includes scoping the types of work required, estimating the amount of people and hours to complete the work, defining necessary tools, supplies, and equipment, and making any purchases. A “shovel ready” project is planned and has any necessary approvals, so that volunteer engagement can begin.

As a field leader planning a volunteer event, having a grasp of the following aspects of planning an event helps to not only lead a successful event but many items assist you in writing an effective and informative event invitation.

Planning a Volunteer Event

- Defining the Project
 - Project Location and Purpose
 - Geographic Location and Type of Work: The start and end locations of the work area and the general details of the type of work. Location information should include the closest trailhead and length of hike to the work area.
 - Purpose, Outcomes, Importance: Briefly define the project’s purpose and describe what a successful outcome from the project would be and why each component is important.
 - An example of this might be: “A two-mile section of the Appalachian Trail is being restored, and on this workday, we will reset the backslope to make the treadway easier to walk, remove woody growth that is pushing into the trail, and improve drains so that the trail is less subject to erosion.”
 - Project Assignment/Approval: Crew leaders will be leading one of two types of projects. Crew leaders should have familiarity with the scope of the project and necessary materials to complete the work.
 - Programmatic Categorical Exclusion
 - Work within the “routine maintenance” category, within the tread’s current route and without need to harvest trees by felling or harvesting other natural materials outside of the trail prism.
 - Natural Resource work to manage non-native, invasive species in an approved manner.
 - Any work, disturbing soil outside of the trail prism, impacting known nearby rare, threatened, or endangered (RTE) species, or that involves significant extraordinary reconstruction or rehabilitation of treadway.
- Estimating the Work Required
 - Task List: Outline all the tasks for the work to be accomplished. Balance needs of a varied volunteer population with the needs of the project. By creating and incorporating different tasks into a work project, you maximize the spectrum of volunteers’ varied abilities, interests, and experience. This also provides the opportunity for volunteers to



- begin work with certain tasks and gain exposure to other activities as they gain confidence and new skills.
- Anticipated number of people hours: With the desired outcomes and known tasks, estimate the number of people-hours necessary to complete the project. This will help determine crew size and/or if the work project is broken into different volunteer events.
 - Essential Eligibility Criteria: Define the essential criteria for participation of all volunteers.
 - Needed Materials: List tools, personal protective equipment (PPE), and project materials. Understand if the crew leader is responsible for collecting and delivering all of these items to the project site, and who will make any purchases required to support the project. Consider materials such as small volunteer perks, like stickers and post-event refreshments that can enrich the experience.
 - Planning for Volunteers
 - Date and Time Selection: When planning an event to accomplish an important task for the Trail and you want to invite new people to volunteer, give some consideration to how scheduling, time commitments, and meeting location impacts participation.
 - Weekdays: generally suitable for retirees, people who do not have 9-5 jobs, but may be necessary if professional trail partner staff will be participating.
 - Weekends: generally suitable for 9-5 workers, college students, teenagers.
 - Try short events (ideally no more than 2-3 hours of work) in the morning, midday, and/or afternoon for people who can't commit a whole day to volunteering but still want to try the experience. A quick and fun introductory experience sets the stage for new volunteers to return. Remember to consider "commuting time" to hike to the work site and back to the trailhead.
 - If a 5 or 7 hour work day is necessary for a project, clearly communicate time commitments to volunteers. Rather than leaving a project open-ended, offering a specific end-time allows prospective volunteers to plan the rest of their life's activities.
 - Location Meet-Up: When possible, consider meeting locations that are central to a metropolitan area, or public transportation, to support access to volunteering by people who face transportation barriers. Include links to maps, street addresses, lon/lat coordinates or even written directions as ways to communicate the meeting location so participants can assess their travel distance.
 - Safety and Communications: Emergency response plans (ERP) are completed in advance, first aid kit is stocked, and necessary paperwork for volunteers is printed.