



Field Leadership Handbook



Leading a Field-Based
Volunteer Experience

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
	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



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.

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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.



Leading a Field Based Experience

A.T. Crew Leader works with a crew of up to 8-10 individuals to complete a project to benefit the A.T. The crew leader ensures that participants have a safe and high-quality experience. The crew leader manages and oversees the work quality and output, the people, and the safety on the project. A project may be one-day or multi-day, though aspects of this training address single-day events only. While projects are typically 8-10 people, a more technical project that requires closer project management, the ratio of participants per leader may be lower. Projects with more than 10 participants may benefit from assistant leader(s) or splitting the group among crew leaders. For projects that are simpler, such as weed removal or trash pick-ups, the ratio may be higher based on the leadership requirements of your organization. Be familiar with your organization's youth policy and guidance on adult-to-youth ratio.

A project field leader:

- Is trained to meet the technical skills required to lead the project.
- Has completed formalized field leader training required by the volunteer organization and/or the land manager.
- Has all required first aid training.

According to Volunteers for Outdoor Colorado, the average length of time a volunteer field leader stays with their organization is three years. Despite also having volunteer leaders supporting the organization for more than 20 years, the change in people's availability to volunteer means the recruitment and training of new field leaders should be an ongoing pursuit of ATC and A.T. Clubs.

Position Overview

Field crew leaders are assigned to lead a project. Project is identified, of value, and approved by land management partners, if necessary. The field leader has not necessarily identified the deficiency for the project date because this may have been done by an A.T. Supervisor, ATC, or land management partner, depending on the location of work. However, the field leader is responsible for meeting desired outcomes for the correction of the trail issue and should visit the worksite in advance of the project day.

Duties include ensuring adequate preparation, volunteer recruitment, work safety, project output and quality control.

Resource: Field/Crew Leader Position Description Template

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Field (Crew) Leader Position Description

(A template provided by ATC for A.T. Clubs.)

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.

As an A.T. Field (Crew) Leader working under the {CLUB} your primary responsibility is to effectively plan, promote, and safely lead a work party to meet the primary objectives of the project to the defined standards of the Appalachian Trail.

Responsibilities:

- Coordinate with trail supervisor/ATC/land managers to understand the crew's expected work, and approval status by land management partners, if necessary.
- Be able to communicate the project need, intended outcomes, importance of the project for explanation to participants.
- Manage project tools and material acquisition, when needed, in conjunction with project supervisor and/or land manager.
- Ensure recruitment of volunteers and send an advanced welcome to support matching expectations to the experience, or delegate and manage the Club's volunteer coordinator/recruiter/liaison to do so.
- Perform advanced project preparation: including advanced communication to participants, essential paperwork, emergency response plan, coordination of PPE and tools, and aligning plans for any refreshments or food for group.
- Actively set the tone and energy for the workday(s).
- Lead a group through the work project with safety top of mind, to produce high quality work done efficiently, with camaraderie integrated into the day. Maintain awareness for organizational risk management, including periods of down-time.
- Create and delegate assignments as you see fit relative to the project for each individual. Ensuring each person is provided with training and has the ability for their assigned tasks.
- Listen and observe the group/project in order to maintain an accurate assessment of people and the group so that work, assignments, and expectations can be adapted as needed.
- Report volunteer time and accomplishments through your organization's defined process and report changes to the Trail Asset Inventory using reporting forms.
- Other responsibilities as needed.

Term:

This is a 2-3 year position with the option to extend the position duration if desired.

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Benefits:

- Opportunity to lead work trips when it suits your availability, though project and date selection should be made at least 1-2 months in advance.
- Spend time in nature.
- Impart knowledge, skills, and inspiration to others.
- Pride in being an essential part of the work that keeps the A.T. alive.
- Deepen leadership and project management experience.

Available Training & Resources:

- ATC Field Leadership Training available
- Opportunity to participate in ATC's Crew Leader training for Advanced Trail Skills.
- A.T. Field Leadership Hangtags (provided following the successful completion of Field Leadership Training)
- Partner resources for volunteer coordination and field leadership resources
- Partner Resources for Trail and Facilities Management
- Safety and Training Resources

Qualifications:

- Completed ATC Field Leader Training.
- Certified in and keep current First Aid and CPR Training, preferably Wilderness First Aid.
- Must be self-motivated and responsible.
- Able to be trained to meet the technical skills required for the project.
- Group dynamics and project leadership experience, preferably in an outdoor/environmental setting.
- Ability to manage personal and group safety in outdoor setting, for a day or longer.
- Ability to learn and follow work standards, techniques, and safe working procedures.

Requirements:

- Carry personal gear required for the specific activity in a backpack and in your hand(s).
- Carry a personal pack which includes necessary hiking items and tools and could weigh anywhere between 20-60 lbs. for the intended duration of the activity.
- Hiking experience and capable of hiking over variable terrain, in changing weather conditions.
- Work in sometimes cold, muddy, and remote locations.
- Perform manual labor tasks including but not limited to lifting 50 lbs. of weight, swinging hand tools repetitively, cleaning out water bars, building new trail structures, cutting back vegetation overgrowth, operating trail maintenance equipment.
- Must have reliable transportation to work section.

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.

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Welcome on Arrival

Field Leadership: What's Your Welcome? This is the first impression. What do you hope to convey to all participants in any interactions you have with them leading up to and including the tailgate safety briefing? (write your adverb here): _____ (e.g.: excited, engaged, sincere)

Effective welcomes set the tone, break the ice, help you assess the group, provide context for the work and its value, communicate critical aspects of safety, and build a container for the group's time together throughout the workday.

Set the Tone for a Welcoming Environment

- See your welcome adverb (above)

Break the Ice:

Icebreakers serve a few purposes:

- Introductions: Help people to learn names of people in the group.
- Energize: Invigorate the group.
- De-inhibit: Facilitate individual interactions.
- Information gathering: Help leaders assess individuals in the group.

Ice breakers are best if they're administered quickly and allow leaders to gain information on why people came and what their expectations or hopes are for the day. Ideally, icebreakers aren't skill-based where some people bring more experience than others (such as introducing a tool - silly, or otherwise).

Tip: Icebreakers should be quick. If you have an hour for a tailgate safety session, your icebreaker/introductions shouldn't last more than 10 minutes.

Assess the Group

- Assessing your crew (physically ready, PPE, water/snacks, layers, etc) – Assessment continues throughout the day but begins at the outset.
- Check for known skills. Understand what kinds of experience different people bring.

Provide Context for the Work and its Importance

- Convey project purpose and outcomes, as well as the practical benefits to the trail or natural environment in order to contextualize the value of everyone's efforts ahead.

Communicate Critical Aspects of Safety and Get Signatures on Paperwork

- Apply the BE SAFE Acronym to cover essential safety aspects.
- Refer to the Understanding Safety resources from ATC and/or Field Leadership Hangtags.

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Tailgate Safety Briefing Mnemonic

A good tailgate safety session doesn't need to be unnecessarily lengthy, though it should cover some essentials. Here's a mnemonic to help frame your next safety briefing: **BE SAFE**.

Bearings: Provide an orientation to the day's planned activities that provides the opportunity for all participants to "get their bearings" on the location of the work, the purpose and intended outcomes, and any squads or assignments for particular volunteers.

Environmental Considerations: Detail environmental conditions that may impact work, including weather, wildlife (including ticks), poisonous plants, hypothermia, sun exposure, trail conditions, overhead hazards, strenuous hike, high water crossings or flood danger.

Safety First: Review the tasks to be accomplished, hazards associated with the tasks and ways to mitigate those hazards; refer to appropriate job hazard analysis (JHA) references.* This is also a good time to make sure everyone has appropriate footwear, clothing, lunch, water, gloves, and sunscreen. During any tool safety overview, stress proper tool handling, safe working distances between volunteers, and proper ergonomics to reduce injury. Reminder to drink plenty of water throughout the day, even if they don't feel thirsty.

Accountability: Everyone is responsible for ensuring a safe work environment. Volunteers should be empowered to vocalize safety concerns that they see. This extends into being aware of others or announcing yourself when you're going to pass through a work area so that work can pause.

Freedom to Disclose: Let people on your crew know that if they have any health concerns they want to be sure you know about they can talk to you after the safety session. These might include back problems, allergies (insects, plants, medication), diabetes, heart or lung problems, or epilepsy.

Emergency Incident Plan: Explain the emergency procedures in place for this crew and any communication devices. Assess the levels of first aid or medical training within group and the location of the closest hospital. If the crew will bushwack to the work site from the parking area, be sure to adequately flag the route in the event of an emergency. Make sure that people who drove communicate where their keys are located.

One way many trip leaders introduce safety sessions for volunteer participants before they start is to outline the priorities for the day in this way:

#1 task is to be safe: Primary to the role of any work trip is to come home safely at the end of the day.

#2 task is to have fun: Secondary to that, we hope volunteers have a great time, so they want to come back.

#3 task is to get the job done: "We want to get the job done, but not at the expense of safety. We can always finish the project another day."

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Introductory Icebreaker Questions

Quick introductory questions offer the chance to get acquainted with one another. The best kinds of questions offer an opportunity for reflection and personalization that go beyond where you live, your favorite brand of shoe, or a recent/upcoming vacation.

Equity-Centered Ice-Breaker Questions

- Favorite snack
- Favorite flower and why (or if autumn/have folks each find their favorite fall leaf from the forest floor and share why they picked it)
- Most interesting wildlife experience
- Describe yourself using three words
- What's one thing that is stirring in you right now?
- Place-based question: What does [this place / Appalachian Trail] mean to you? What's a memory you hold of this place?
- Who taught you or journeyed with you as you learned about being outdoors?
- What are you most looking forward to today? (this week?)
- What are you bringing (or what brought you here?) and what do you hope to take from this space today?
- What is a superpower you bring to the space? How will you share it?
- Your most meaningful volunteer experience.
- What has been sparking joy for you lately?
- If you were a sound, what would you be?

Tips for Facilitating Ice-Breaker Questions

- "Passing" (not responding) should always be an option. If someone chooses to pass on the first time around. Before closing the activity, ask at the end if anyone who passed would like to share.
- A small "throwable" object – a small, soft inflatable ball – is an optional alternative to clockwise/counterclockwise options.
- Be aware of group dynamics and where ableism, sexism, racism, etc. may show up in responses.

Handshake Mingle

The handshake mingle activity gives people the specific instruction to people to "mill about and meet people." When the facilitator calls out "freeze," find someone near you (or the person you're talking to) and make one of these following new types of handshakes. Participants introduce themselves then answer a question provided by the facilitator.

"Gimme Shelter" Handshake: Together, make an A-frame shelter, in whichever way you prefer, and answer any other question provided by the facilitator.

"Crosscut Saw" Handshake: Together, synchronize pulling the end of your imaginary two-person crosscut saw (this might create some laughter as people coordinate their alternating pulls). Then answer any question provided by the facilitator.

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Activity: Feasibility & Impact of these Welcoming Tools

Purpose: Examine how difficult the following tools are to achieve and the impact each is likely to have when implemented so that volunteers feel welcomed and supported.

Using these numbers beside welcoming tools listed at the bottom of the page, place responding number on the grid below related to the ease of you as the leader to perform and the likely impact for the participant.

Easy to do										
Difficult to do										
	Lowest Impact					Highest Impact				

1. Ask people what they hope to get out of the activity.
2. Provide clear instructions and details about the day.
3. Define the goal of the activity and its importance.
4. Use people's names.
5. Respect the pronouns people share as part of introductions.
6. An icebreaker to build connections.
7. Introducing newcomers to consistent volunteers who are talking among themselves.
8. Assign a "welcome committee" of 1 or more consistent volunteers to ensure new arrivals are actively welcomed while people are still arriving.
9. Aim to understand and respond to comfort or discomfort with the experience (e.g. addressing "trail breaks" / how to use the bathroom when traveling in the woods).
10. Discuss in advance that work can be scaled to ability and skill.

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A Leader's Role

Leaders ensure a positive volunteer experience so that volunteers seek out future opportunities. The goal is to keep people engaged in meaningful work and interested in learning techniques to more effectively accomplish the project objectives. Leaders manage safety, monitor quality and consistency of work, and coach for necessary improvements. They distribute praise through various forms of appreciation and are continually assessing participants to adjust to individual and group needs. They are also responsible for recording accomplishments of work events. They uphold and represent the image of their organization.

With this multitude of responsibilities, crew leaders must demonstrate the qualities of teachers, leaders, and managers.

Qualities of Field Leaders:

Teachers provide knowledge, information, and demonstration for participants to gain understanding and apply their knowledge. Demonstrate patience while conveying subject-matter expertise. Encourage the application of the best techniques to achieve the desired results. Clearly communicate from the outset of the day that you are the teacher and will provide feedback to help participants do the work - more safely, effectively, efficiently. Teachers are authentic and believable. Convey what you do know with certainty. Do not fake responses on what you don't know; instead commit to and follow-through on getting the right information to them.

Leaders are ambassadors for their organizations. They are strategic in decision-making, having taken time to examine future scenarios, and can connect the activities of a project to a larger plan/purpose for participants. Leaders motivate, boost morale, and are fair and consistent in their management of a team. They confidently delegate tasks/activities, trusting their competency to teach individuals and manage the group.

Managers bring solid event planning, by ensuring the right tools, equipment and supplies are available in advance of being needed. As the primary manager of safety and project quality-control, the manager balances efficiency with efficacy, participant satisfaction, and group dynamics.

Good crew leadership balances being a resource for others and "swinging tools" to lead by example. Performing the work can be a useful tool in modeling behavior, but it should not come at the expense of circulating to check work-quality, teaching refinement of skills, and buoying spirits.

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Assigning Work

Assigning work to volunteers helps them meet new people and learn new tasks. Through early and ongoing assessments of volunteers, as a leader, you're likely to gain perspective on participants':

- **Expectation:** What each individual aims to gain from the experience. The more the experience can align with their expectation, the more positive their experience is likely to be. Leaders should be aware that expectations may adjust for participants throughout the day.
- **Skill:** The knowledge and ability each person brings to the beginning of the day. Skills and abilities evolve as they learn and take on new tasks/responsibilities throughout the work event.
- **Personalities:** Allow people to shine as individuals and give them tasks that suit their personalities.
- **Physical and Psychological Safety:** Observe aspects of skill performance, attentiveness to task, relationship to work or work-partners.

Consider asking volunteers what they're most interested in doing, so that to the greatest extent possible, you can honor the request, without sacrificing safety or quality.

Assignments may be adapted throughout the day based on ongoing assessments throughout the day.

As a leader, you might either:

- Allow for experienced participants to begin work fairly immediately on project activities assigned to them, while you instruct newer participants on tasks.
- Pair new and experienced participants.

The approach you take as a leader will likely be determined during the critical hour as you assess participants' skills, knowledge, and experience. If you have people who say they bring experience but who are unfamiliar to you, monitor from a distance to make sure their performance meets your expectations, and coach them on any work that may need improvement.

Pairing Work Assignments: New and Experienced Participants

It's common for leaders to pair less experienced volunteers with more experienced volunteers. When doing so:

- Explicitly convey to the more experienced volunteer what you want taught to the new person. Be sure to check in later with the new participant on their comprehension and performance of the activity.
- Ensure experienced volunteers are teaching and allowing new participants to practice and develop skills instead of simply observing.
- Optimize rotations of volunteers by acknowledging:
 - Individuals' interest/need to learn as much as possible on a given project aspect.
 - Have a varied experience and skill practice/development.
 - Time to learn a new task.
 - After just mastering a new task, swapping tasks and learning something new may feel more frustrating than empowering.

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- Observe when personalities aren't jiving and making reassignments creates a small inconvenience to create an ultimately beneficial experience for participants.

When you have people doing a great job, you can use them as illustrative reference to how they, too, can be doing the work.

If you notice that you have some members that are always first to volunteer and step in be sure to offer the opportunity to those that may seem more reserved to get their hands on a project. Leaders should be vigilant to managing the crew for fairness, activity assignments, work-partner rotations, breaks, positive conduct, and the navigation of differences that pose obstacles to the work or group cohesion.

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Working with Adult Learners and Active Listening

Learning and a volunteer's perception of the value of their contributions are united in understanding the importance of the work to the Appalachian Trail resource or the surrounding natural environment.

When a participant understands not just how to perform a task, but the sustainable trail principles that guide the approach to the activity, they are more likely to perform the task to the highest standard independently going forward because the value of the approach is understood.

Consider the Learning Environment: Think about the position and the learning environment when presenting and teaching. Make necessary modifications to enhance learning.

- Be positioned where you can see participants' eyes. Be cognizant of if you are back-lit, or if the sun is in participants' eyes, and aim to prevent that kind of diminished learning environment.
- Ensure safe, stable footing for participants while they observe. Trying to teach skills while people are standing on steep terrain with challenging footing is not an ideal environment.
- Verify that participants can hear you clearly.
- Be prepared to demonstrate how to respond respectfully when and if other people/hikers are coming through the teaching area.
- Address things that might be distracting people: bugs, noise, or fears/anxieties about the experience.
- May need to adapt teacher demonstrations in cold weather, when participants may benefit more from moving than listening and watching.
- If teaching a new skill at the end of the day, observe for fatigue which can make focusing on instruction more difficult.

Teaching Techniques: Provide different ways for various participants to absorb information by applying various ways of teaching. Teaching techniques fall into three categories and are best mixed:

- **Lectures / Telling / Describing / Explaining:** By talking through the current condition, desired outcome, and task impact, participants pair this context with what they observe from demonstrations and apply through their actions.
- **Seeing it:** By showing participants either laminated graphics that represent the final desired outcome of an activity, or through watching a demonstration, participants can aim for the desired results. Accompanying curriculum or hand-outs are always helpful reference resources to have on hand.
- **Learn-by-Doing / Active Participation:** Practice-makes-perfect for participants as they apply what they have seen and heard. The opportunity to be mentored as they apply their knowledge helps deepen their understanding.

Inquiry to Assess Understanding and Extend Support to Participants: After teaching for the desired outcome and assigning a duty/responsibility, you can check within individuals about what they are going to do, with a prompt to affirm instruction has been useful: *"You're assigned to ABC. Tell me how you'll do XYZ?"* Here are some additional questions to that support adult learners:

- Can you expand on that?
- What are your major concerns with {this project, this assignment}?

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- What solutions/choices do you see?
- How can I help?
- What needs to be done? How do you plan to do it?
- How do you feel about that?
- How did you come to your decision?
- How do you plan to do it?

There can be different approaches to solving trail problems, some of it is aesthetic, some is resource/material based, and some of it is technique/knowledge. As a leader, be clear about your parameters about when you ask for and are willing to accept participant-created solutions, if room exists for variability or adaptation.

If participant input cannot be applied due to project parameters and/or suggestions will not influence outcomes, it is better not to solicit input.

Active Listening: Active listening is the practice of not interrupting the speaker, bringing complete focus to what is being said, and requires not planning a response while the speaker is talking. Active listeners can also look for body language and non-verbal feedback, such as stance, head gestures, and facial expressions.

As an outcome of active listening, leaders are better prepared to thoughtfully respond in a non-judgmental way to what participants share. After a participant has shared, leaders can paraphrase their understanding, inquire for better understanding, or simply reflect on what was heard.

Active listening helps combat the tendency people have to only be able to recall 50% of what they hear immediately after they have heard someone talk.

Tip: As leader, beyond offering demonstrations, don't touch a tool to accomplish work yourself until everyone is doing the task successfully. Your role isn't for you, as a leader, to do the work, but to provide support for participants to achieve the objectives. After you demonstrate, let other people perform task toward the desired outcome.



The Arc of the Day

Critical Hour (A concept from Volunteers for Outdoor Colorado): Sets the stage for the day

- Assessing your crew (physically ready, PPE, water/snacks, layers, etc) – Assessment continues throughout the day but begins at the outset.
- Exciting (positive, engaging, sincere)
- Ice Breaker (CAUTION: don't make it skill based – where some people know tool/others don't.) (Be thoughtful, it should be quickly administered, good idea to ask why everyone is there – get their expectations and what they'd like to accomplish)
- Safety (discuss hazards, first aid supplies, ERP/safety net, medical disclosure, communicating about 'trail breaks')
- Tool briefing
- Share Goals/Objectives (how much we'll likely accomplish, check for known skills, describe process. (The more you can explain you are about plans, objectives, and goals the less confusion there will be around priorities. Members will know what they're working toward and feel more engaged in the process.)
- Listen (silence, for what, ongoing)
- Complete paperwork

Mobilize to the worksite

- Hike to work area: Who leads group, who sets the pace/how fast, spacing on hike in

Working

- Worksite (deploy workforce)
 - Consider setting all tools down at the beginning of work area in a cache. Walk the length of the project area with the crew pointing out work/areas/desired outcomes. At end of work area, get water and put on gloves, (maybe leave pack), and on way back to tool cache, crew leader could assign responsibilities/tasks with certain tools.
 - Thoroughly and concisely addressing the desired outcomes from the day through a Walk and Talk together as a group to define goal, set priorities, point out specific projects, discuss terminology and address concerns. Utilize pin flags to highlight certain project locations. Might leave laminated cards of the desired outcome.
- Monitor needs of participants – hunger/thirst/warmth – meeting needs for safer, happier, more motivated group.
- Monitor the work, (quality assurance/control)
- Coaching, (provide constructive feedback – rather than focusing on what is done wrong, focus on things they did well and provide actionable ways for improvement. Talk to the volunteer about what they were setting out to do and what their vision was. Work through mistakes constructively is a great learning tool.)
- Teaching: Take advantage of “teachable moments,” the unplanned opportunities to share knowledge or skills related to project outcomes, as well as fauna and flora, or notable geologic features.

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- Downtime (breaks and lunch – take breaks as group, lunch, snacks – as crew leader you’re always available to your crew members.) Consider site distance. Listen to what’s being said – what observations can you make about morale, needs, issues.
- Always, managing for safety: avoiding unnecessary risk. {Discuss risks people may have encountered with doing something that was ‘easy or fast’ ...}
- Show appreciation throughout the day: let folks know what they do well.
- Take pictures (or have someone that does!)

End of the Day

- Review accomplishments with specificity since it’s rewarding for volunteers to understand the full impact of the activity. “We installed 4 waterbars and 2 rolling grade dips” or “We rehabbed 800 feet of sidehill trail.”
- Trailhead Unwind, Debrief, and Celebrate: Consider providing appropriate refreshments or light snacks as the group bonds and reflects on the day by asking what worked well and what could be improved. This is also a superb time to pass out stickers or other materials you want to send volunteers home with. If they are receiving an email evaluation, remind them when to look for it in their inbox; otherwise, it’s a fine time to also offer small evaluation forms for anonymous feedback. (Ask what worked well? Ask What could be improved? Celebrate/Thank folks)
 - Ideas for ending with a positive community experience might include: A “spirit circle,” high fives all around, end-of-day photo shoot, or pie.
- Reporting accomplishments (hours, volunteers, narrative sentence, and trail asset inventory update forms, if needed).
- Share information about future volunteer opportunities.
- Final safety reminder for trip home (ticks, driving)

Post Project Duties

- Tool return: If your organization has a tool cache manager, flag equipment in need of maintenance or repair. Otherwise address necessary upkeep and maintenance of tools.
- Report on accomplishments to organizational lead for essential maintenance.
- Use Trail Asset Inventory Update forms for projects on the A.T. where trail features are added, removed, or structures are modified.
- Submit rosters and waivers to organizational lead or upload to database.
- Send a follow-up email to volunteers to thank them a final time, to include photos of the day, a memorable story, a recap of the accomplishments for their records, and a notification of upcoming opportunities to join your group in the future (or where/how to find their next volunteer activity).
- Review evaluations for opportunities for future improvement.

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Human / Group Dynamics

Tuckman's model of group development helps leaders anticipate and respond to various stages of working with groups. These group dynamics are normal, and they are not static.

Dynamic	Enthusiasm & Skill	Participants likely experiencing	Leaders dealing with this dynamic offer
Forming	 E S	Participants may have little agreement; may be unclear on purpose.	Explanation: Provide guidance and direction. Define the goal.
Storming	 E S	Participants may have conflict or power struggles, all the while having some increased clarity and purpose.	Demonstrate and Coach: Provide participants with additional information and encourage them to do what you would like them to do.
Norming	 E S	Participants "get it" and there are clearer roles/responsibilities. There's agreement and consensus.	Guide and Facilitate: Provide support smooth operation. Ensure people have what they need to be effective.
Performing	 E S	Participants are focused on the goal and actively working toward achievement. Unified in a clear vision and purpose.	Enable, Empower, Delegate: Have the next task available to the individual or the group so you're prepared, in advance, to direct people to the next activity.
Adjourning		Participants have completed their task(s) and feel good about their achievement(s).	Celebrate: Provide recognition by leading the celebration, honoring individuals' contributions.

Building positive group dynamics is facilitated by the crew leader and can be fostered in a number of ways.

- Talk with every individual and encourage others to do the same.
- Bring the group together for lunch / snack times / at end-of-day unwind.
- Host "Bursts of Fun" - Facilitate riddles or activities that encourage people to have fun, especially during break and lunch time. These activities are great for intentionally creating space for community.
- Maintain an atmosphere of respect.
- Vary work teams as much as possible.
- Check in with your volunteers frequently.
- Involve volunteers in as much decision-making as possible. Use consensus when possible to make sure everyone's needs are being met.
- Model what you expect from others, both on and off the trail.
- Keep structure. Limit unknowns.
- Have high but attainable expectations.
- Encourage leadership in others.

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Efficiency and Effectiveness

Field leaders must often balance efficiency with effectiveness. The balance of force and flow creates dynamic tension between work accomplished quickly and work performed well. This dynamic tension exists with volunteer management as well since the quality of the experience for volunteers has an influence on the likelihood they will return for future activities.

Just as a short-term fix on a trail project requires more time and attention in the future because quick-fixes fail quickly, volunteer inclusion in new skill development takes longer, but leads to greater participant satisfaction and deepens the pool of volunteers willing, able, and interested to return.

Adaptability with Group Management

Field leaders have clear expectations for the day that they aim to be consistent in approaching. However, all field management must be adaptable. Plans, weather, and human dynamics are always changing. It's good to be ready to go with that flow of issues that arise. Have contingency plans. Ask your crew to help solve problems, when appropriate.

In addition to being able to shift overall plans for the day based on changing dynamics, adaptable leadership also applies to how you teach and manage since people respond to different leadership styles and learning. Have the ability to change your leadership style and communication strategy. Stay calm under pressure.

Maintaining Physical Safety Standards

Refer to the ATC's Understanding Safety Curriculum for students and instructors, as it relates to advanced safety planning, tailgate safety sessions, and required paperwork for volunteer protections.

Field leaders as safety managers most often must apply constant gentle pressure when it comes to enforcing policy and standards - particularly about wearing appropriate personal protective equipment (PPE). Effective ways to address PPE doubt may include the following approaches:

- Unpack the value of PPE and why certain items of PPE are used for certain tasks.
- Circumstances can change in a moment. While certain tasks may be safe to do without a given item of PPE, by wearing all the standard PPE at all times, you're always prepared.
- Remind people calmly in a positive and encouraging manner since getting mad won't change the behavior and could instead damage your relationship.
- If you catch yourself (or others) in a grumble about wearing a piece of PPE, use it as a reminder to shift to a more important question: "How can I carry this task even safer?"

Volunteer Rights and Responsibilities: Maintaining Behavioral Standards

A.T. volunteers subscribe to Standards of Care Management Policy. The rights and responsibilities of volunteers working for the benefit of the Appalachian Trail provide detailed expectations on behavior.



Volunteers have the right to:

- *be treated with respect,*
- *have a workplace free of harassment, discrimination, or hostile conditions,*
- *receive a suitable assignment,*
- *receive training and necessary support,*
- *have qualified supervision,*
- *have safe working conditions, and*
- *have their time used effectively.*

Volunteers have the responsibility to:

- *make safety the highest priority,*
- *act in a professional manner,*
- *treat others with respect,*
- *follow Trail policies and guidelines,*
- *participate in and learn from training sessions and meetings,*
- *perform high quality work,*
- *care for Trail resources, as well as*
- *seek and accept guidance and support.*

Field leaders conduct themselves in a manner consistent with volunteer rights and responsibilities, and expect no less from participants. Actions that may be detrimental to the A.T. network of cooperative management partners, the public, and natural resources or are in violation of the A.T. network's shared values are considered misconduct. Each organization hosting A.T. events should follow directions in its code of conduct related to reporting grievances that are unable to be resolved close to the source.

Managing Conflict

Conflicts prevent the work of the crew or present a safety issue. Conflict can be individual (intra-personal), between two people (interpersonal) or among the group (intra-group). A leader's fair, firm, and consistent management of a team can often prevent conflict from arising.

However, when conflict develops, the leader needs to understand the root cause of the issue. This happens through an inquiry and investigative process. Focus on the problem rather than the person, and demonstrate respect to all people involved. Once a problem is identified, maintain a problem-solving attitude by focusing resolutions around benefiting the project at hand.

Questions that may assist in navigating conflicts:

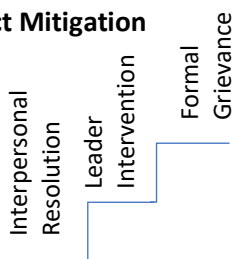
- What's the best way to work it out?
- What solutions do you see?
- How can I help?

It is important to address conflict even though it can be hard. It is best to do it as early as possible to avoid increasing tension.

A helpful mnemonic for addressing conflict is **EAR**. Allow participants to **e**xpress what they are experiencing. **A**ddress the point of conflict. Define a **r**esolution.



Scales of Interpersonal Conflict Mitigation



Interpersonal Resolution: When individuals are able to directly discuss issues that arise in an open way, this helps lead to improved communication and stronger working relationships. When possible, leaders may find ways to support interpersonal resolution. However, in some instances, this approach is not an option, or is unsuccessful.

Leader Intervention: When participants are in conflict, it may be necessary to support navigating a resolution if their own interpersonal attempt(s) to resolve the issue are unsuccessful.

Formal Grievance, Investigation, Resolution: For issues that are severe, persistent, are unable to be addressed through leader intervention, or may involve a leader, there are processes within organizations and land management agencies for formal complaints to be submitted, investigated and resolved. These processes take time, so do not lend themselves to immediate issue resolution in the field but are a resource for issues of significance.

Volunteer Dismissal

If an issue with a volunteer seems significant or is recurring, the field leader should make field notes. Notes should include details on the incident(s) and a reference to the time of corrective conversation(s).

Before considering asking a volunteer to leave, talk to 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 the group. Only send someone home as a last resort, and document what led to the decision.

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Evaluations

Speedy evaluations offer a good deal of information to activity leaders on what works well and what improvements could enhance volunteerism in the future. Here is a sample evaluation that can be sent by email.

Evaluation

Thanks for joining us as a volunteer. Please help us improve by providing your feedback on the experience.

Activity Name & Date:

Did you attend?

Please rate your experience: ←

Yes

No →



Tell us why you gave this rating:

Do you have interest in becoming a leader?

- Interested
- Not Interested
- Maybe in the future

Please tell us why

- I didn't have enough information to attend.
- Health-related issue
- Family Emergency arose
- Weather-related reason