

PROJECT LEADER & TECHNICAL ADVISOR TRAINING





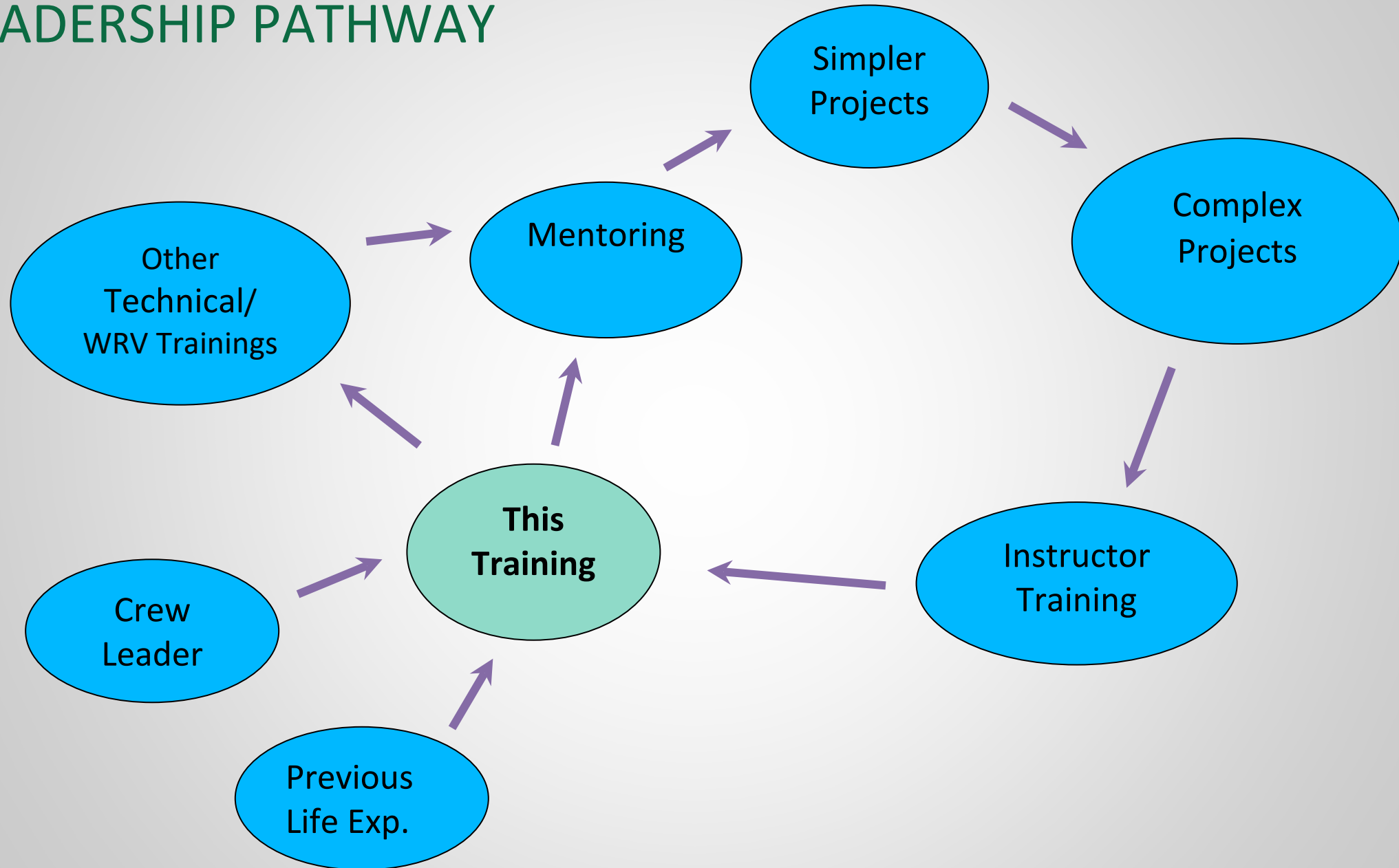
TRAINING OUTLINE & LOGISTICS

- Schedule & format
- Training goals
- Project team and coordination of roles
- Project timeline and planning

Site visit & Risk Management

- Crew Leader Orientation
- Project Day
- Project closure: Debrief & monitoring
- Resources, ongoing training and mentorship

LEADERSHIP PATHWAY



PROJECT LEADER

Promote WRV mission on small, time-defined scale

Planning, oversight and execution – think of timeline, longer time commitment than other roles

Leads and Facilitates – how do you balance?

Successful project – what does success look like?

Excellent volunteer experience – what will make a volunteer want to return?

Responsibility

- logistical planning & scheduling
- coordinating roles and communicating

TECHNICAL ADVISOR

The **Technical Advisor** fulfills an important role on the Project Team, acting as a **technical bridge** between WVRV and the land management agency.

The TA **helps develop or translate** the agency's **project goals** into a scope and format that is appropriate **for** a group of **volunteers**, and effectively **communicates** the technical needs of the project **to** the volunteer **crew leaders**.

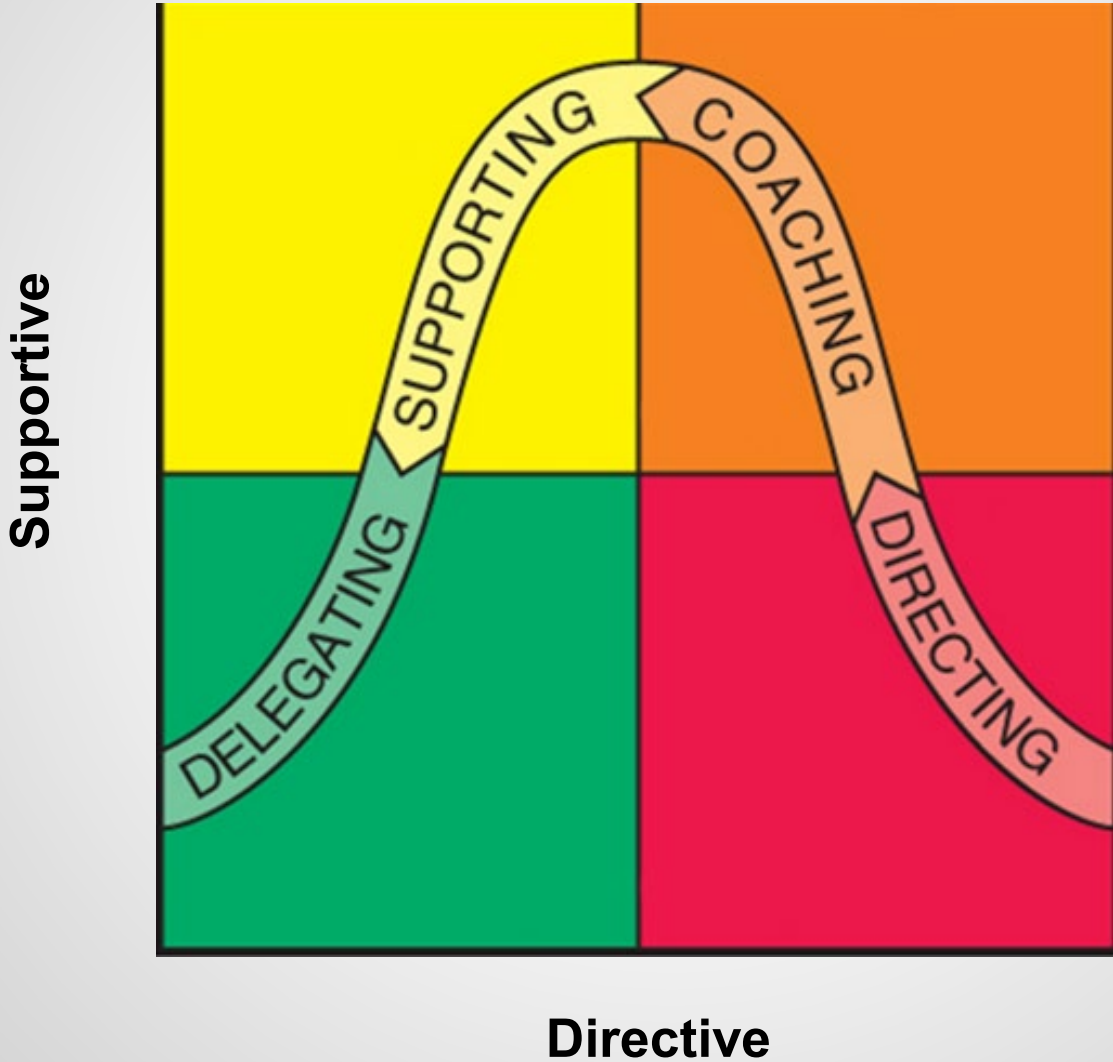
Responsibility

- technical notes & specifications
- materials, staging & tool list
- time commitment

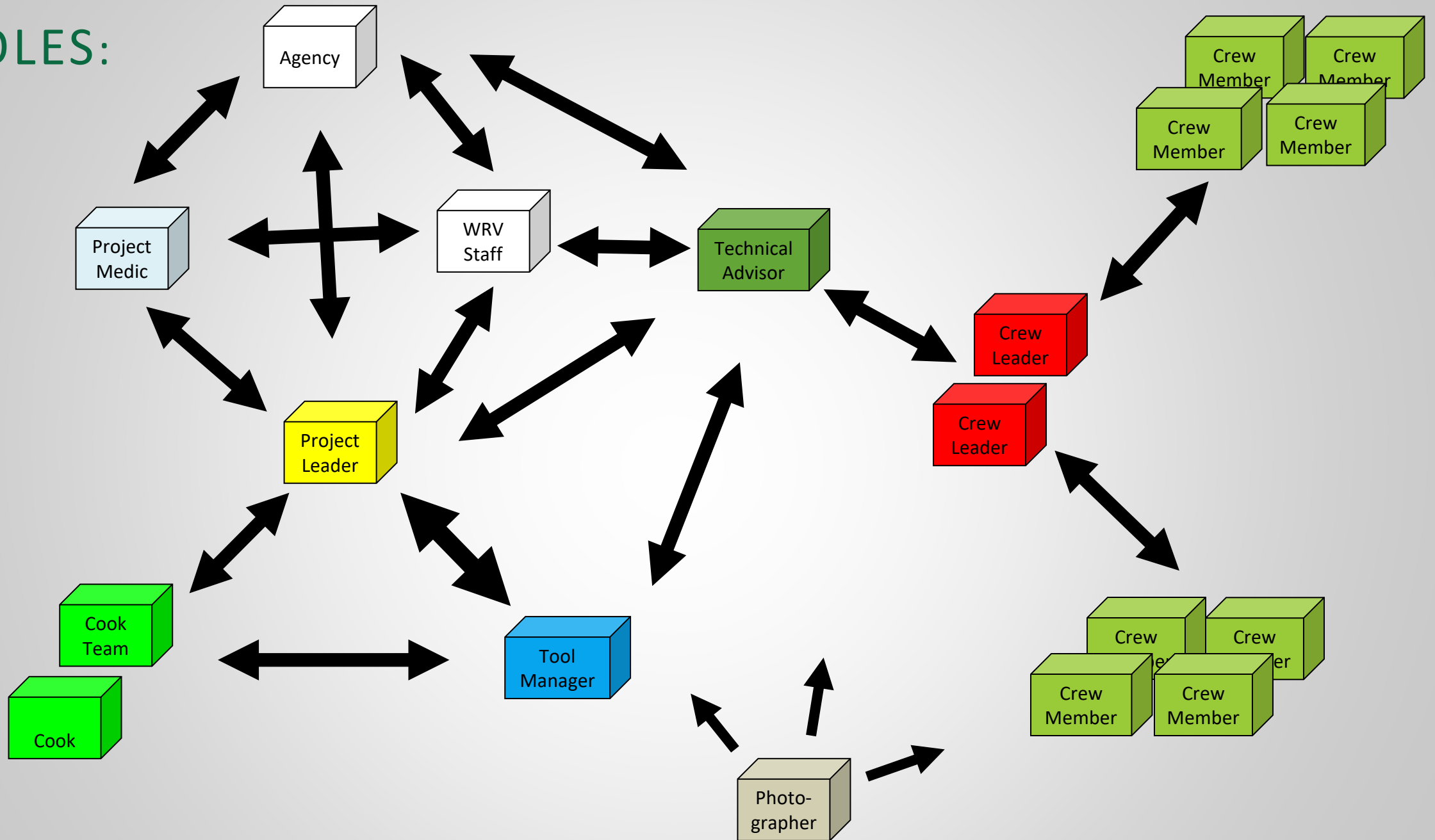
ASSISTANT PL & TA ROLES

- Assistant role is as a **Trainee**
 - Unless decided otherwise ahead of time
 - Mentoring begins before project day
- This is the trainee's chance to step up!
 - Delegate some tasks to the assistant
 - Assistant should be pro-active and ask for assignments
 - For example, APL could do some of the announcements, ATA could take a section of work

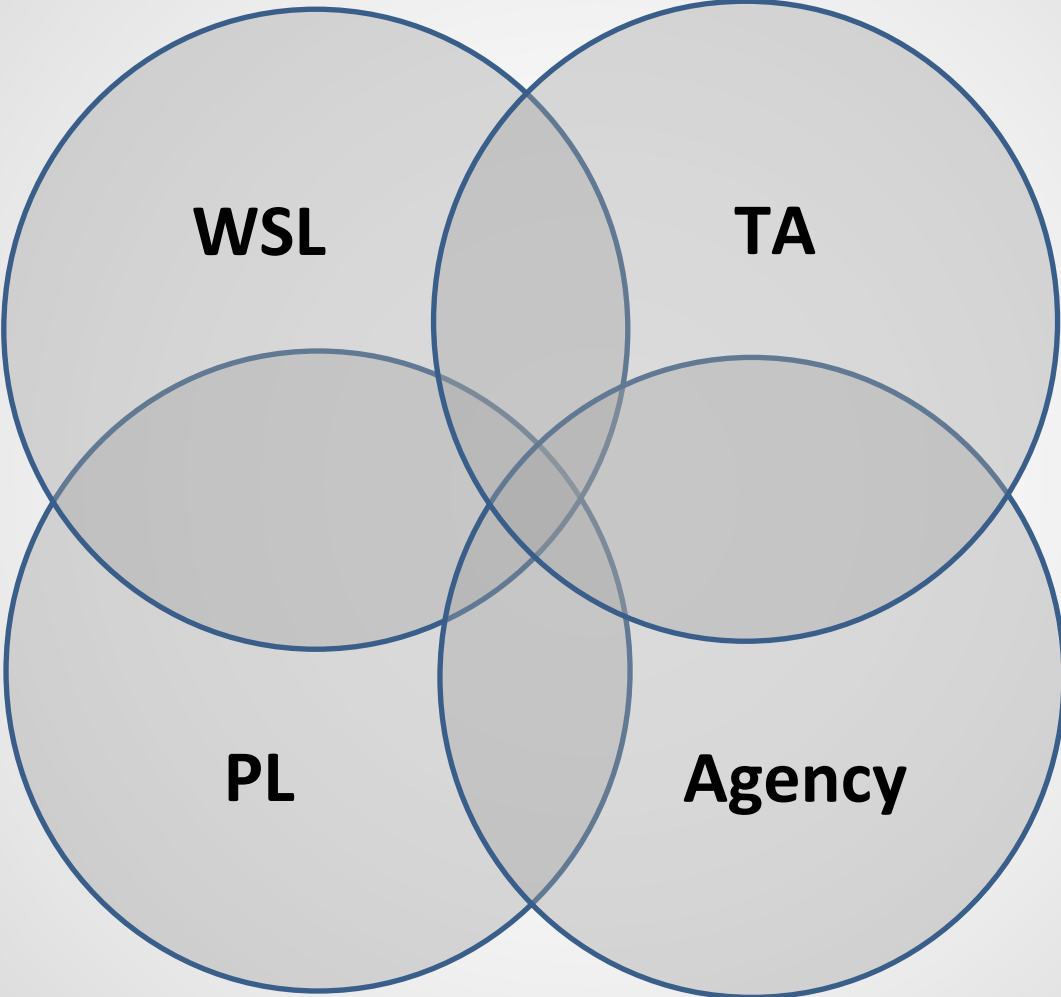
SITUATIONAL LEADERSHIP: WHAT IS IT?



ROLES:



GREY AREA

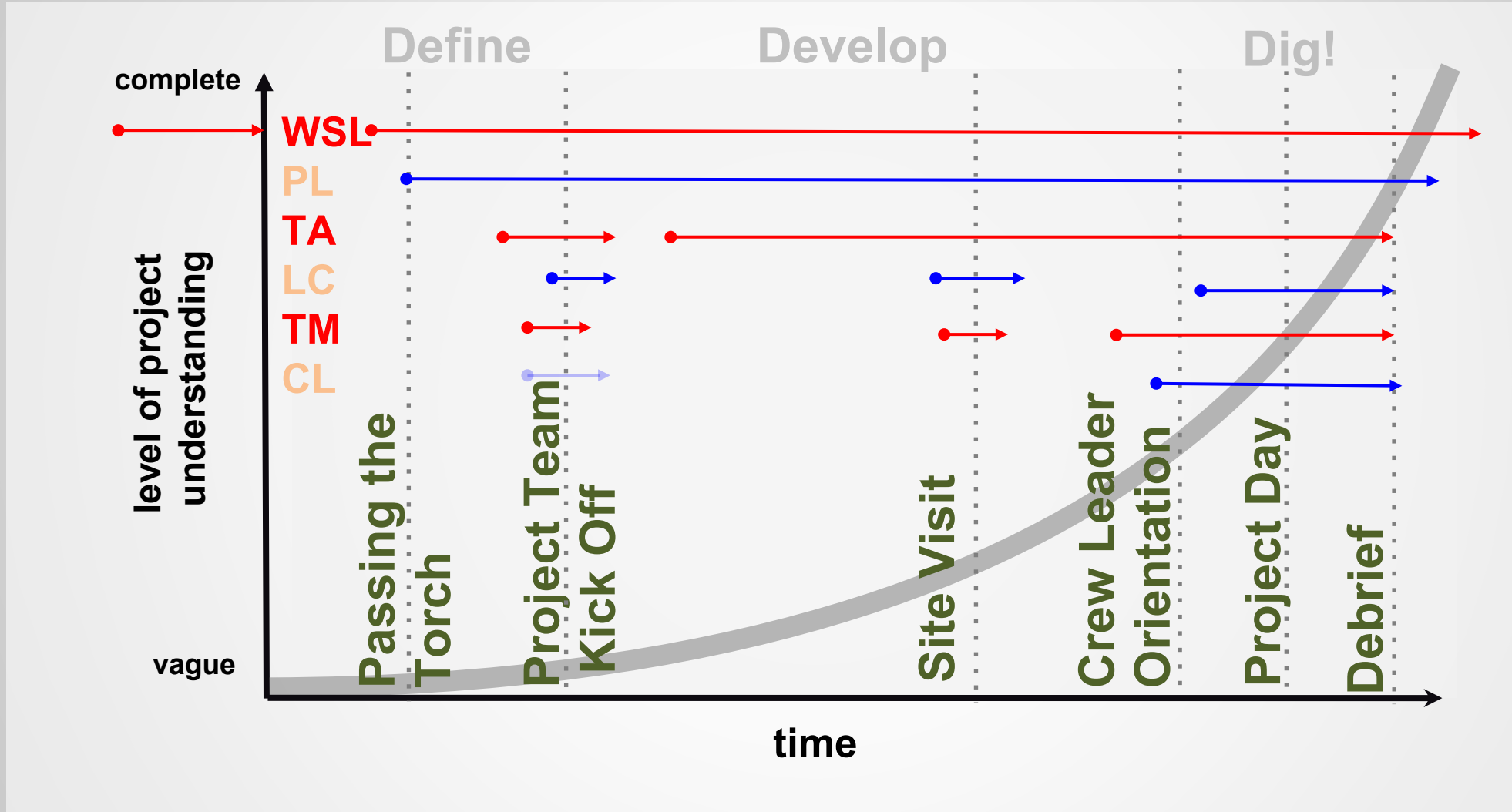




PROJECT TIMELINE & PLANNING TOOL

- Planning Progression: Project Management Checklist
- Scouting & Planning: Scout Form
- Site Prep
- Risk Management: Risk Assessment Form
- Communication: Technical Notes
 - Preparing the Team
 - Tech Notes
- Project Day: Checklist
- Post Project: Debrief/Survey

PLANNING PROGRESSION



SCOUTING & PLANNING: SITE VISIT

- Purpose: Gain information about project site
- Who: WSL, AC, TA, PL

TA: Design

- It should be fun & challenging!
- Gather info about site
- *Listen* to land manager
- Review environmental & safety hazards - considerations
- Discuss design & methodology options
- Review overall expectations
- Categorize event – hard/med/easy
- Take photos & make sketches

PL: Logistics

- Gather info about site
- Directions/access
- Parking, registration, meal site
- Camp site options
- Take photos

PL & TA: Scope

- What is size and complexity of project?
- How many volunteers?
- How many crew leaders?
- Plan contingencies & Risk assessment
- Tools needed
- Environmental impact of volunteers

SCOUTING & PLANNING: SITE PREP

TA & WSL

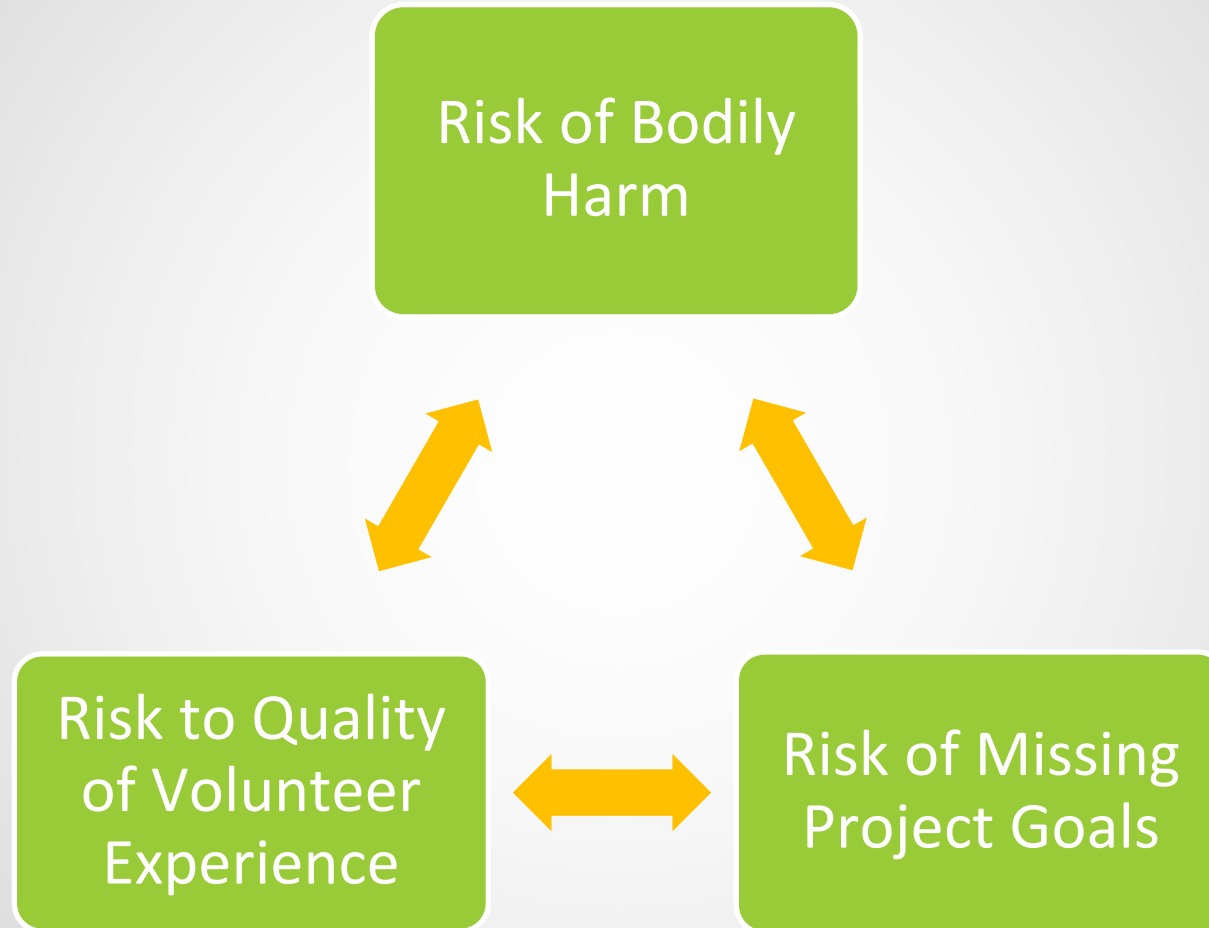
- Walking the area – over and over
- Corridor identify, ribbon, flagging, staking
- Identify – campsite/cooking-mess area/parking/evacuation staging area/helo drop site
- Material staging – where all materials placed
- Heavy equipment usage – where?
- On-the-ground tool for communicating the work – radios/other plans





BREAK

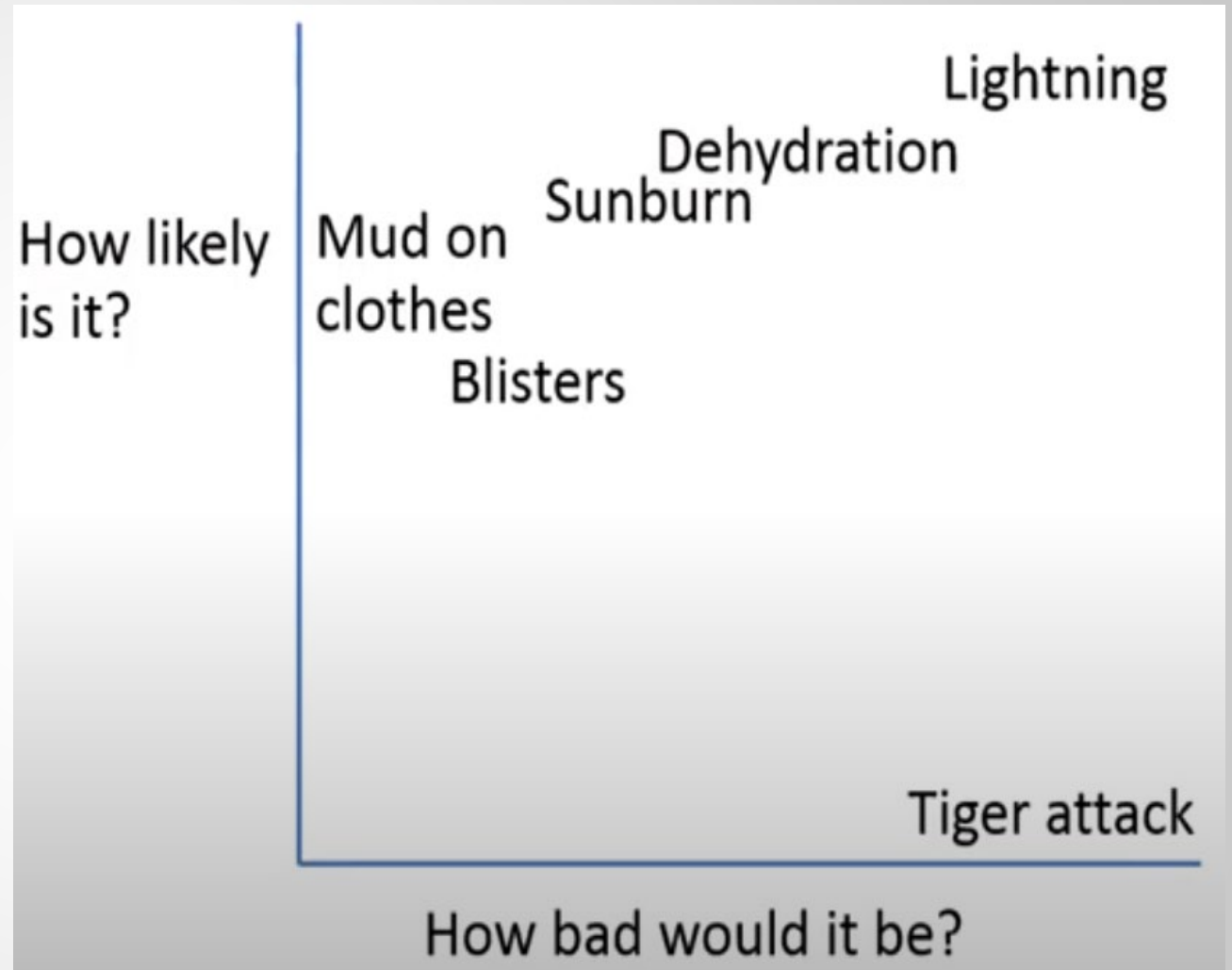
RISK MANAGEMENT: KIND OF RISKS



RISK ASSESSMENT

Probability x Consequence
= Risk Factor

- Pay special attention to *high-probability* risks, even if *low consequence*.
- Pay special attention to *high-consequence* risks, even if *low probability*.



RISK MANAGEMENT: POLICY

1. Minimum Age
 - Flexible
2. Quiet Hours 10pm-6am
3. Alcohol and Drug Use on Projects
 - Let people know the cook area and camp fire area
 - Be aware of minors around alcohol
 - Agency Rules Supersede
4. Crisis Communication
5. Non-Discrimination/Harassment

RISK MANAGEMENT: RESOURCES

Project Risk Assessment Form

WRV Emergency Response Plan

Incident Report Form



Project Risk Assessment Form

Purpose: to help project planning teams evaluate the risks associated with a project and define ways to prevent problems from occurring and/or manage them if they do occur.

Section 1: BACKGROUND INFORMATION

Project Date: _____ # Volunteers: _____

Project Name: _____

Project Description: _____

Project Location: _____

WRV Staff Liaison: _____

Consider this list of the most common risks applicable to WRV projects. Check off all those that apply to this project. Ensure that the project team is aware of prevention and mitigation measures.

Risk	Common Prevention and Mitigation Measures
<input type="checkbox"/> Site Hazards	Ensure that one crew does not work above another. If a crew must work above another, make sure everyone knows how to alert in case of moving objects. All volunteers should wear safety harnesses and helmets.
<input type="checkbox"/> Unstable, uneven, or steep slopes	Are there any poisonous plants in the work/camp vicinity? For example, poison ivy? If so, make sure all crew leaders can identify the species and show them to crew members. Mark off risk areas with bright colors. WRV has poison ivy cream that can be used preventatively.
<input type="checkbox"/> Poisonous plants in vicinity	Is the purpose of the project to remove a highly toxic species (e.g. myrtle sponge) or even a mildly toxic species whose extensive exposure can produce a reaction (e.g. knapweed)? If so, plan how to avoid exposure (to hands, eyes, etc.) and how to treat exposure if it happens.
<input type="checkbox"/> Poisonous plant removal	Are there any poisonous insects in the work/camp vicinity? Examples include bees, yellow jackets, wasps, black widow spiders, etc. Clearly mark off areas around bee hives, wasp nests, etc. to alert people to stay away. Make sure volunteers with acute allergies stay well away, and/or carry appropriate medication.
<input type="checkbox"/> Poisonous insects	What disease risks are there in the area? For example, if there are West Nile mosquitoes in the area, ask volunteers to wear mosquito repellent and long sleeve clothing, and avoid being out at dawn/dusk. Avoid outdoor infested sites that could carry Eastern Virus (look for droppings). If ticks is a risk, wear long sleeved clothes and inform volunteers to do a tick check at night. ETC.
<input type="checkbox"/> Disease vectors	If volunteers will be working with scrap metal or other sharp debris in the work/camp area, ensure all those working around those materials have up-to-date tetanus shots; wear long sleeve clothing, work gloves and boots. Avoid handling as much as possible.
<input type="checkbox"/> Scrap metal and debris	If traffic is in area, especially with limited visibility, notify volunteers to be careful and/or post a watch to help people cross the road.
<input type="checkbox"/> Traffic hazards	Could a wildfire trap volunteers? If so, identify alternate escape routes.
<input type="checkbox"/> Wildfire	If bears are known to inhabit the project area, store food securely at night (e.g. in a vehicle or behind a bear fence). If bears are regularly seen in area, and volunteers how to respond in an encounter.
<input type="checkbox"/> Bears	



WRV Emergency Response Plan

The purpose of this form is to document the best course of action to respond to a serious injury. A serious injury is defined as any injury that requires the attention of a project medic. The need for a project medic is left to the discretion of the project medic and/or the patient, depending on the circumstances. The project leader is responsible for completing this form.

Note: the Partner Agency's Emergency Response Plan, if deemed adequate by WRV Project Team, supersedes this plan.

Section 1: PROGRAM INFORMATION

Project Date: _____ # Volunteers: _____

Project Name: _____

Project Location: _____

WRV Staff Liaison: _____

Partner Agency Emergency Contacts:

Name: _____ Position: _____ Phone: _____ Cell Radio
Satellite

Known Cell Phone/Radio Coverage: _____

Name: _____ Position: _____ Phone: _____ Cell Radio
Satellite

Known Cell Phone/Radio Coverage: _____

Section 2: RESOURCES

Name	Role	Assigned Crewleader/Section	Level of First Aid Training (Basic First Aid, CPR, WFA, WFR, EMT)	Training Current?



Incident Report Form—WRV

The purpose of this form is to (a) document the type of injury/illness, cause of injury/illness, (b) document evacuation method (if necessary) and (c) provide a formal patient report in the case of a serious medical emergency. The Project Medic or other designated volunteer with advanced medical training, is responsible for completing this form or delegating this responsibility as they see fit. Please complete this form to the best of your ability and provide a final copy to WRV staff liaison within one week of the incident.

Project Name: _____

Patient: Male Female Volunteer Staff Age: _____

Incident date and time: _____

Chest complaint: _____

Geographical location of incident: _____

WEATHER (at time of incident)

Temp (°F) _____ Precipitation: rain snow none Wind (mph) _____ Visibility _____ feet / miles

Surface conditions: wet dry snow ice trail rock uneven flat sloped

TYPE OF INCIDENT: (Check each applicable category)

injury illness motivation/behavior near miss fatality damage

Did the patient leave the site? NO YES If yes, on what date/time? _____

If the incident was a NEAR MISS please describe only what you observed, just the facts and no speculation:

EVACUATION METHOD

walk unassisted litter vehicle helicopter other _____

Did the patient visit a medical facility? NO YES If yes, length of stay at facility (in days) _____

TYPE OF MAJOR INJURY, ILLNESS, DAMAGE (Check all that apply)

bruise, contusion or similar soft-tissue trauma burn (severe)

laceration/cut dislocation

eye injury head injury without loss of consciousness

muscle strain laceration

frostbite head injury with loss of consciousness

dental or tooth-related skin abrasions

fracture near drowning or other submersion problem

other _____

PROPERTY DAMAGE

Was there damage to: vehicle equipment property?

If so, please describe: _____

ANATOMICAL LOCATION OF INJURY

head forearm pelvis face wrist hip eye hand/fingers thigh neck chest knee

shoulder abdomen lower leg upper arm upper back foot elbow lower back ankle

toe other _____

TYPE OF ILLNESS (Check all that apply)

allergic reaction mild or localized severe, generalized or anaphylaxis altitude illness acute mountain sickness

pulmonary edema cerebral edema hypothermia (specify core temperature if known) heat illness (specify core temperature if known)

heat exhaustion heat cramps heat stroke chest pain or cardiac condition

upper respiratory illness (runny nose, congestion, "cold") upper respiratory illness (other)

abdominal or other gastrointestinal problem without diarrhea diarrhea apparent food-related illness

non-specific fever illness urinary tract infection skin infection other (explain) _____

DO NOT: use any names on this form!

DO: use this form for *any* injury.

...COMING SOON: Revamped Project Management Checklist

RISK MANAGEMENT: RESOURCES

- The Emergency Response Plan (ERP)
 - Agency may have a safety plan -> USE IT!
 - You may have to pester them for it
 - Ask a local if in a distant community
 - Google maps for nearest hospital (trust but verify)
 - View and review the driving directions!
 - Names of project medics
 - Communication methods
 - Personal cell phones?
 - WRV radios?
 - Agency long-range radios?

BUILDING THE PROJECT TEAM

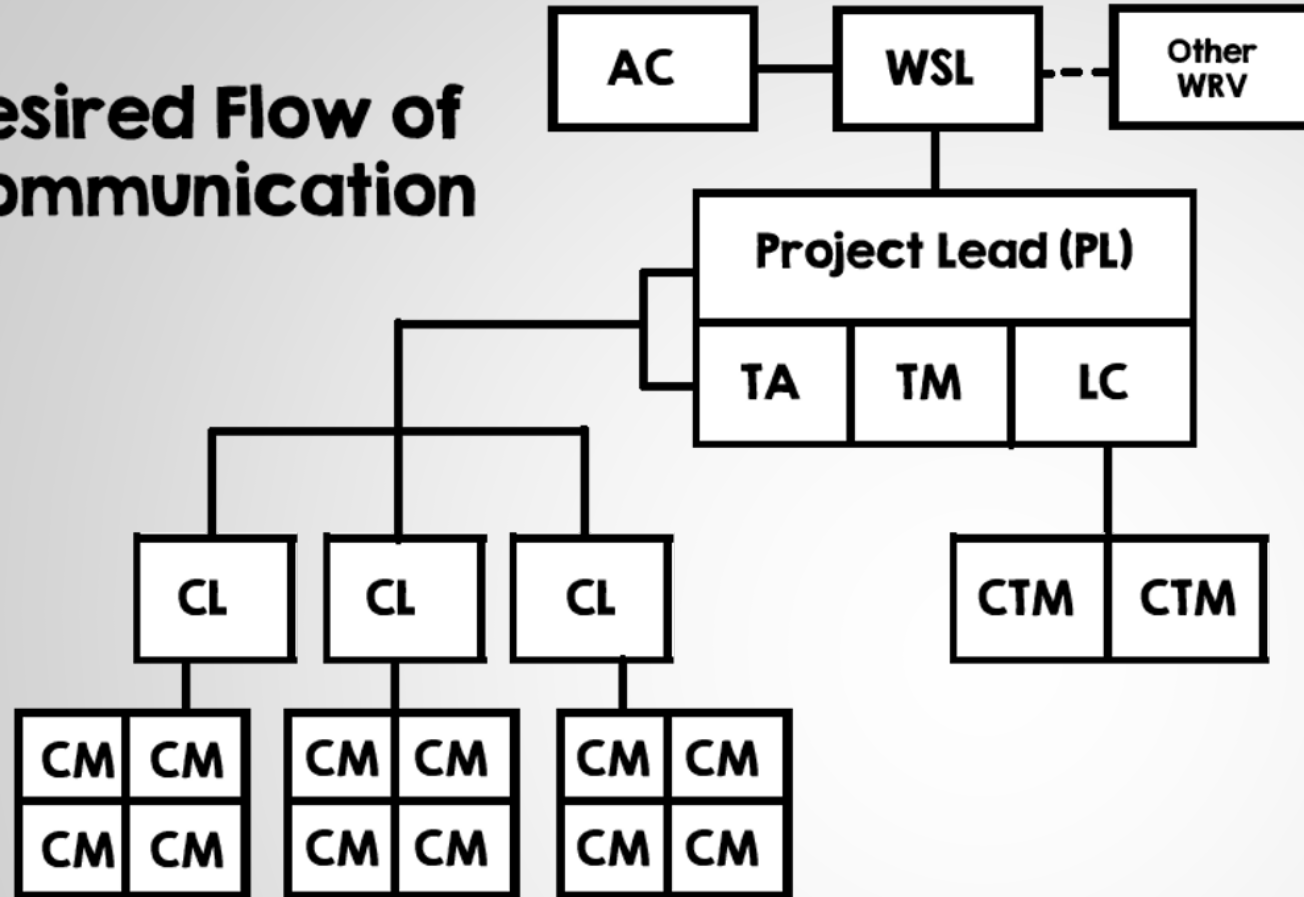


- Discuss the project with the WSL (WRV Staff Liaison) and establish goals and responsibilities (pass the torch meeting).
- Verify all team positions are filled - there will be occasions where you need to recruit a role.
- Initially contact all team members and have a kick off meeting.

COMMUNICATING WITH THE TEAM

- Everyone has their favorite mode
 - Email?
 - Text?
 - Voice?
- Find out preferences and use them
- As project day approaches, quick, efficient communication is especially important
- Good communication is key to a smooth project

Desired Flow of Communication



WRV Acronym Key:

WSL = WRV Staff Liaison
PL = Project Leader
AC = Agency Contact
TA = Technical Advisor
TM = Tool Manager
LC = Lead Cook
CTM = Cook Team Member
CL = Crew Leader
CM = Crew Member

MED

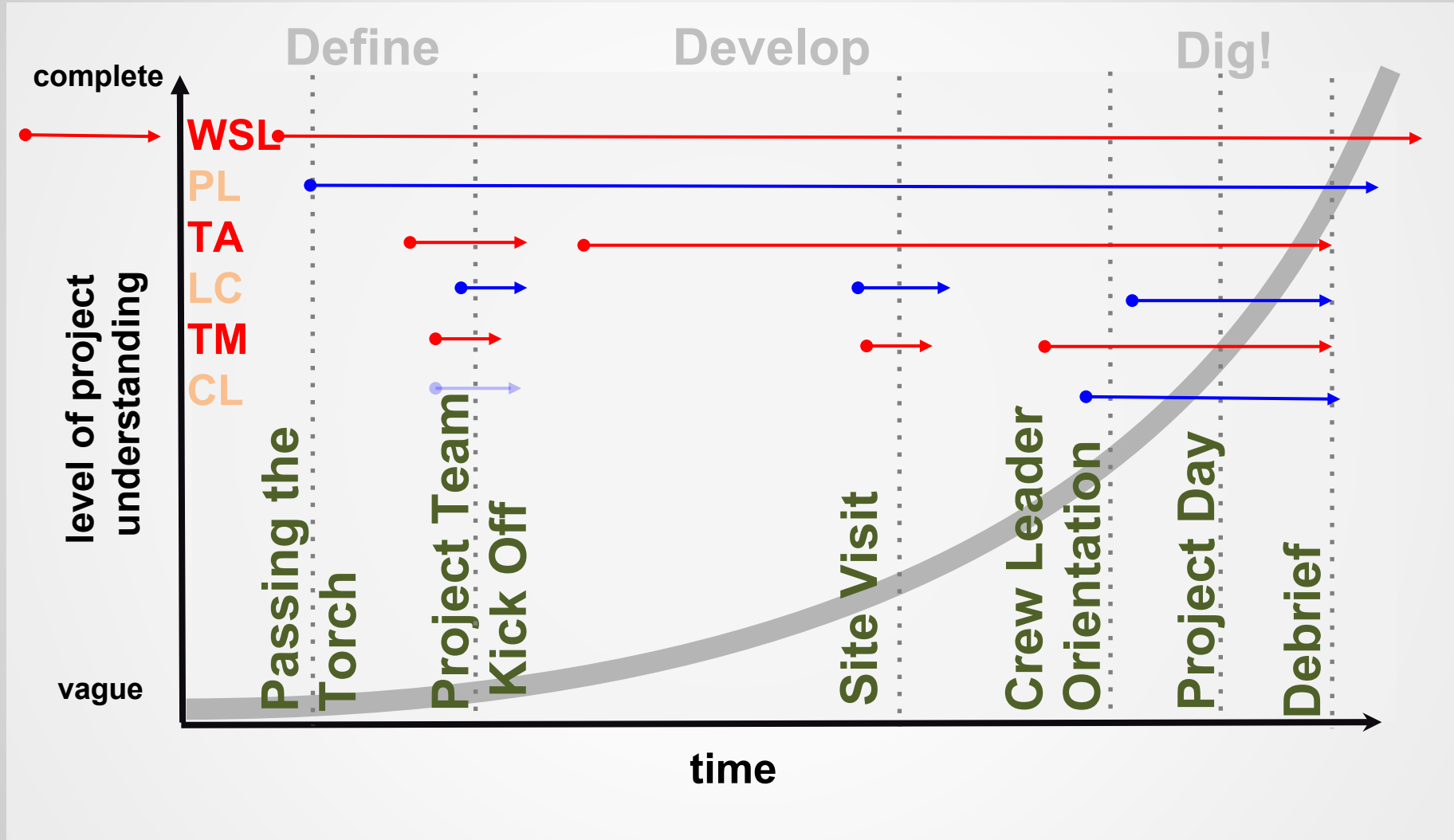
Project Medic changes the flow of information in cases of emergency

COORDINATION BETWEEN PROJECT TEAM AND ROLES

The PL works as the leader of a team of skilled volunteers.



PLANNING PROGRESSION



COORDINATING BETWEEN ROLES

PL

What does the PL communicate to...

- Technical Advisor
- Tool Manager
- Cook Team
- Crew Leaders
- Crew Members – high fives and smiles!

TA

What does the TA communicate to...

- Project Leader
- Tool Manager
- Cook Team
- Crew Leaders
- Crew Members

COMMUNICATION: PREPARING THE TEAM

The best plan in the world is worthless if it's all in your head.

- WHO? ... needs to know
- WHAT? ... do they need to know
- WHEN? ... do they need to know it
- HOW? ... will you communicate it

COMMUNICATION: CREW LEADER TECHNICAL NOTES

PL

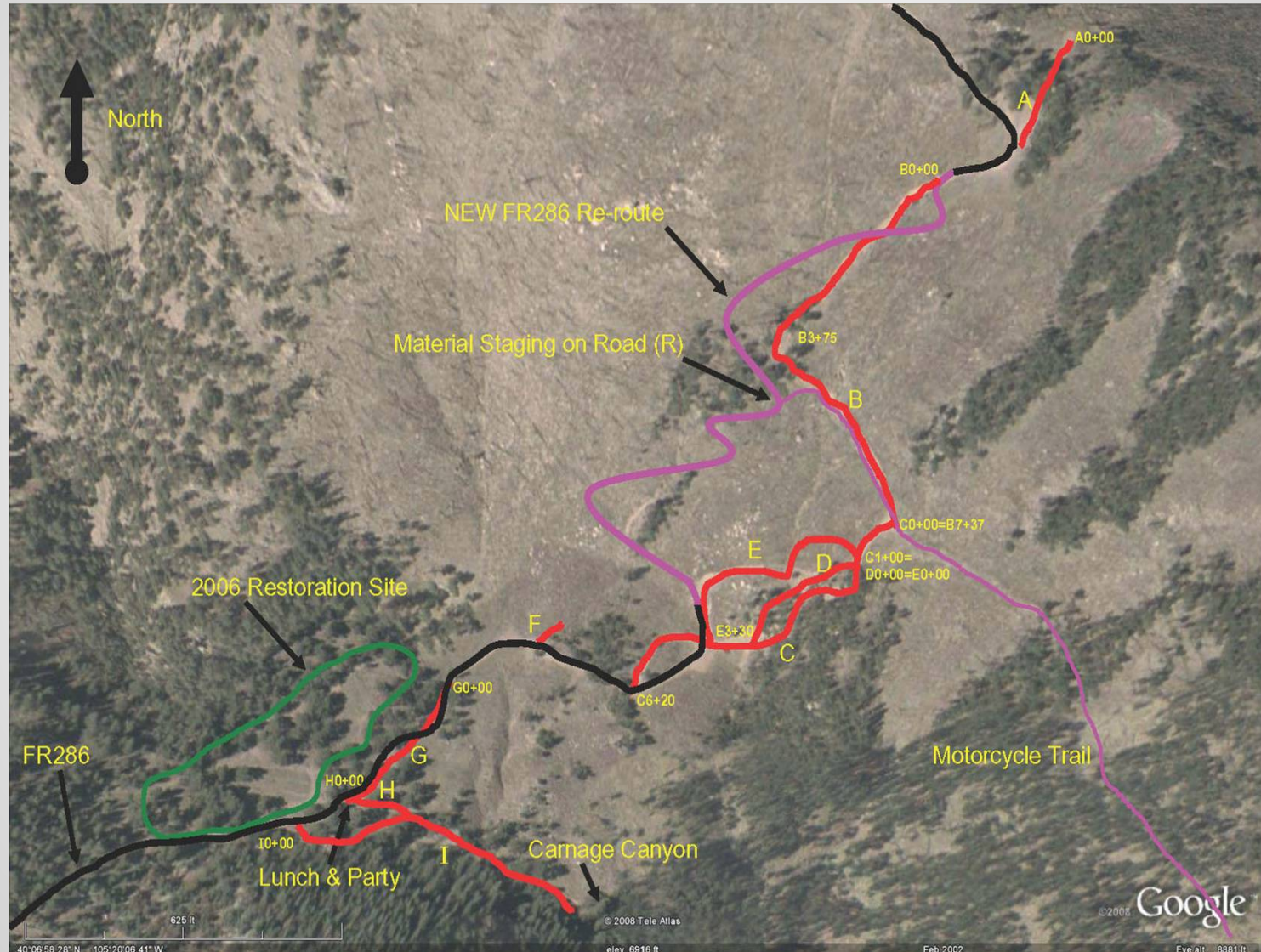
- Project Description & Logistics
- Site Description & Project goals
- Project Team members & contact Info
- Safety Net
 - Risk Assessment
 - Emergency Response Plan
- Project Day schedule
- Project site map, parking, registration, camping, bathrooms

TA

- Site Preparation & Conditions
- Context: What caused the problem?
- Construction & Restoration Methods
- Section Notes
- Reference drawings, Sketches, Photos
- Tools per Crew
- Work site map & sections
 - location of 'borrow' pits, transplants, water, etc.

Be Concise
Samples Available

COMMUNICATION: SITE MAP



COMMUNICATION: TOOL LIST

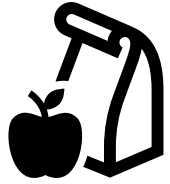
TA

- Collaborate with tool manager, adjust with crew leader input
- Try tools before project: Are they the right tools for the job?
- Familiarize yourself with our tool shed.
- Template available from VWRV office.
- Supplemental tools from partners or Sunbelt.

COMMUNICATION: THE CREW LEADER ORIENTATION

- Purpose
 - Get project team on same page
 - Prepare Crew Leaders for working with Crew Members
 - Assign sections, feedback on additional needs
- Place
 - Office, On-site, Demo Sections
- Key Stakeholders
 - WSL, PL, LC, TM, TA, CL





BREAK

FINAL PREPARATIONS: REVIEW THE PROJECT DAY SCHEDULE

- Arriving at the site and setting up
- Registration
- Introductions
- Crew Formation
- Tool distribution
- Lunchtime activities
- End of work celebration
- Mop up

FINAL PREPARATIONS: Project Day Documentation

PL or WSL

- Volunteer Roster (WSL)
- Release Forms (WSL)
- Blank Incident Reports (WSL)
- Emergency Response Plan
- Project Day schedule
- Crew leader list & extra Crew Leader notes

TA

- Crew Leader Technical Notes
 - Section Notes, if needed
- Tool List (TM)
- Site information (e.g., maps)

PL/ TA/ AC

- Education component (e.g., lunch talk)

PROJECT DAY: ROLES

The PL's Role

Ensure a positive volunteer experience

- Fun, personal accomplishment, community involvement

Ensure safety

- Oversight and monitoring, safety decisions

Monitor the flow of work

- Keeping the big picture of goals and schedule

Build community

- Camaraderie, friendship, loyalty

The TA's Role

Your big reward!

Provide guidance

- support to crew leaders, answering questions as needed

Encourage crews

- take advantage of “teachable moments”

Ensure quality results – for success of restoration & partner relationships

Build community

- Camaraderie, friendship, loyalty

ADJUST TO CHANGES

WHAT DO WE DO ON PROJECT DAY?

Morning

And they're off!

- Morning Announcements, Team Huddle & Crew-up
- Be visible, available and flexible
- Decide and communicate changes
 - Radios or in-person to team members
 - White board for project-wide or overnight communication
- PL: Facilitate movement, delegate!
- TA: Answer questions, ensure quality

Afternoon

Lunch and beyond!

- PL: Facilitate lunch
- TA: lunchtime educational component (or AC, PL arranges)
- PL/ TA: Project Team huddle, schedule/work adjustments
- Lunch announcements
- Thank you's and good-bye's
 - May want to say thank you's at lunch

WHAT DO WE NOT DO ON PROJECT DAY?

- Do not join a crew!
 - limit your labor (NORMALLY But....)
- PL Does not offer technical advice! (TA Does)
 - keep information to crews simple and from one source
the TA
- Do not offer conflicting advice
 - Coordinate

END OF PROJECT DAY: Accomplishments & Appreciation

PL

- What have we accomplished today? Collect & communicate
- Thank you's
 - Team members
 - Agency
 - Crew Members
- Recognition of trainees
 - “Hat Ceremony”
- Celebration
- End of day reflection (...your job's not done yet!)

TA

- What have we accomplished today? **RECORD STATS**
 - Collect from Crews, PL
- Recognition of trainees
 - “Hat Ceremony”
- End of day reflection
- Document lessons learned
- Set up monitoring
- AS BUILT NOTES

WHAT HAPPENS AFTER PROJECT DAY?

PL

- Thank Project Team again and agency
- Share outcomes with WSL: quantity of restoration work, obstacles overcome, follow up needed
- Collect volunteer hours from Project Team and send them to WSL
- Collect debrief responses in survey/ form
- Make sure WSL has final copies of all project documents
- Make sure that the WSL receives information on any potential leadership recruits
- Follow up with photographers to make sure photos are delivered to WRV staff

TA

- Share outcomes with WSL: quantity of restoration work, obstacles overcome, follow up needed
- Document lessons learned
- Save everything in WRV knowledge base - WSL Can update Technical Library
- Make sure WSL has final copies of all project documents - including project debrief form
- Forward TA photos/sketches to WSL
- Return all WRV equipment
- Meet with ATA or intern – compile info
- Return for monitoring on select sites

POST PROJECT: THE DEBRIEF/SURVEY

- Purpose
 - Record what we learned for future projects
 - Pros/cons important to weigh in
 - Determine potential leaders
 - Record project hours and stats
- Where
 - Onsite if possible – team huddle
 - Offsite: home within 48 hours – oral/written input from team on PL or TA side
- Key Stakeholders
 - WSL, PL, LC, TM, TA, AC, CLs

Starting in 2020: We will collect this info via survey



PROJECT DEBRIEFING FORM

Project Name:	Date of Project:
Project Leader:	Date of Debrief:
Form Filled Out By:	
Agency Contact:	
Attendees:	

Please describe succinctly any **problems** and **outstanding successes** you encountered in the categories outlined below.

Suggestion: Use the topics below as your agenda for the debrief meeting. Take debrief minute notes in Minutes area at end, then transfer the “nuggets” to the sections below. That way, if the discussion is rich and wanders a bit (as it sometimes does), you can capture the details as they come, but distill out the key insights below.

USE THIS SECTION TO RECORD MINUTES – box expands automatically THIS SECTION WILL NOT BE REVIEWED FOR SUPER NUGGETS

(this section is for extra notes not recorded in the Super Nuggets Section below)

USE THIS SECTION TO RECORD “NUGGETS” OF INFORMATION

Examples of important “nuggets”: ideas on how problems could have been avoided, and recommendations to future leaders to avoid similar problems and achieve success. Please type up results. Boxes below will expand as needed. THIS SECTION

Pre-Project Planning Nuggets (scheduling, site visits, meetings, communications, leadership roles, etc.)

(Form last revised 03/19/13)

Potential New Leaders (names; recommended leadership roles; why are they good candidates?)
Donations and In-Kind on Project including the name of the contact(Ex Einstein’s Bagles, donated services like massages, donated equipment, discounted services or items, etc) :
Highlights from Volunteer Survey (not enough vegetarian food, slow start, great lunch time talk, etc):
Additional Comments:

Project Closure Checklist – to be completed by Project Leader

- Thank everyone on the Project Team.
- Conduct a Project Team Debrief and send completed debrief form to WSL.
- Give final electronic versions of all project documents to WSL (e.g. technical notes, section notes, diagrams, maps, tool list, registration form, and anything else that might be useful on a future project.
- Follow up with volunteer project photographers to make sure photos are delivered to WRV staff.
- Tally up hours of all volunteer team members and enter send to WSL.
- Debrief and evaluate with your assistant project leader, if you had one, and report results to WRV Staff Liaison (WSL) on project.
- Debrief your experience as project leader with WSL.

KEEP GOING – MORE INFO ON NEXT PAGE!!!

USE THIS SECTION TO RECORD TANGIBLE RESULTS

Date and Project Name: (example: April 21, 2012: Braly Pond Project - BCPOS)

Description: (example: Braly Pond is a former sand and gravel mine adjacent to the Saint Vrain River near Lyons, CO. Now it is one of several ponds along the riparian corridor managed by BCPOS. Wind driven waves have been causing bank erosion along the eastern shore. On Earth Day weekend WRV stabilized 800 feet of shoreline by installing coir logs. Volunteers also planted over 1,000 willow poles for habitat and erosion control. Within weeks the willows were sending up new branches.)

Vol. Hour Calculation: (example: 108 vols * 8.5 hrs each + 10 hours meal planning + 42 TA & ATA works + 51 hrs CL & CLT + 20 hours PL & PLT + 60 hrs AmeriCorps prep work, +6 Tool Management =1,107)

Gender:		Age:				Total Vols	Total Hours
Male	Female	Under 18	18-54	55+			
6	6	0			12	48 (7*4 + 5*4)	

Please use equations below your final number to explain how you calculated it. Example:

Ft. of Trail Closed
1576
1000ft+76ft +500 ft

Youth/Ameri-Corps Group Name	AmeriCorps Member Hours	Unique # AmeriCorps Members	Youth Corps Hours	Unique # Youth Corps Members	Youth Edu. Hours	# of Youth Contacts for Edu.	Trail Vol. Hours	Ft. of Trail Constructed	Ft. of Trail Closed	Ft. Trail Maintenance/Enhancement

Ft. of Boardwalk, bridge, puncheon, deck/tumpike	Ft. of Fence/ Barrier Built or repaired	Ft. of Stream/ shoreline restored	Ft. of Stream Aquatic/ Riparian Weeds Removed/ Surveyed	Ft. of Stream or shoreline benefited	Feet of Road Deliberated and/or Revegetated	# of Plants/ shrubs/ trees planted	# of willows planted	Burn Area (acres) Seeded/ Mulched	Area (acres) Weeded
				780					

Area (R2) Seeded	Area (R2) Planted	Area (R2) Erosion Matting	Area (R2) Mulched	Area (R2) Wetland Restored	Area (R2) Riparian Area Restored	Area (acres) forest, burned or in which kum piles created	Area (acres) of Grassland Benefited	Area (acres) Habitat Benefited	Person-Hours of Seed Collection

# Projects enhanced riparian/ wetland habitats	# Projects enhanced alpine/sub-alpine habitats	# Projects that enhanced forest habitats	# Projects that enhanced Prairie habitats	# Noxious Weed Projects	# of Youth Service Projects	# Projects USFS	# Projects City of Boulder	# Projects BCPOS	# Projects National Wildlife Refuges	# Projects National Parks
						1				

# Projects Col State Parks	# Projects Other Jurisdiction	Total Number of Project Events at Site

(Form last revised 03/19/13)

PLANNING SUMMARY

A complete plan for a WRV project answers these questions:

- **Who?** All team members understand their roles and have bought into the plan
- **What?** A clear expression of project goals and scope
- **When?** An hour-by-hour schedule of the event
- **Where?** Maps, drawings, work areas, section numbers, etc.
- **How?** A detailed description of the work, including safety concerns & mitigations
- **Why?** Consideration of WRV's core values: education, community, celebration, empowerment, tangible results, healing & love of nature



ONGOING TRAINING & MENTORSHIP

- Take the next step
 - Team night – Yearly Kick-off, were you there?
 - Mentorship: sign-up to be paired with an experienced leader for the year
 - Be an Assistant Project Leader or Assistant Technical Advisor
- Help Us Help Others
 - On going feedback on your Leader experience
 - Suggestions for our Project Management Checklist or Technical Library
 - On your first few projects, use the checklist and planning progression to reach planning milestones. Note changes/improvements and discuss with the training team
- Mentoring Guidelines Sheet
- Sign-up for mentoring opportunities, check out the Leader Grid to see open roles



RESOURCES TOUR

- [Leader Resources](#)
 - [Technical Library](#)
 - [Leader Grid](#)
- Planning Resources
 - [PL Checklist](#)
 - [Scout form](#)
- File sharing (Google docs, Dropbox...)
- Meetings & Conferencing (Doodle, Free Conference call, Join.me, Zoom etc...)