



UNIVERSITY OF OREGON

# Willamette National Forest Volunteer Strategy

Key Findings  
&  
Recommendations

Appendix and Supplemental Materials

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Table of Contents

**Project Purpose: ..... 1**

**Appendix Format:..... 1**

**Author Contacts:..... 1**

**Section 1: ..... 2**

**Willamette National Forest Staff Consulted: ..... 2**

**Section 1a: Internal Interview and Focus Group Summary ..... 2**

        Summary of Findings ..... 2

        Recreation Staff ..... 4

        Key Findings..... 4

        Natural Resource Staff ..... 7

        Administrative Staff ..... 8

        Key Findings..... 8

**Section 1b: External Focus Group Summary ..... 9**

        Key Takeaways and Summary Findings from the Individual Worksheet:..... 10

**Section 2: ..... 20**

**Section 2a: Friends Group Case Studies: ..... 20**

        Friends/Partner Groups Examined: ..... 20

        Common Themes:..... 21

**Section 2b: Agency Case Studies:..... 22**

**Section 2c: Table 1: Partner Group Attributes. .... 24**

**Friends Group/Partner Group Profiles: ..... 29**

**Section 2d: Table 2: Forest Service Unit Attributes. .... 45**

**USDA Forest Service Profiles:..... 46**

**Section 3: ..... 50**

**Equity and Diversity Resources:..... 50**



## **PROJECT PURPOSE:**

As Community Service Center student consultants, our team's project is to work with the Willamette National Forest to aid their efforts to develop a strategy for implementing and sustaining volunteerism. Specifically, the Forest aims to partner with an entity that can serve as an effective administrative and organizational hub for disparate volunteer groups. To determine what characteristics this partner must have, we researched several elements to inform a strong strategy. These elements included internal Forest concerns, current external volunteer status, and relevant case studies. This Appendix to the Report provides our research on internal forest conditions and desires, external conditions and desires, and case study findings. The information gathered here comes from interviews, focus groups, and case study research and readings.

## **APPENDIX FORMAT:**

This appendix document is broken into three sections each corresponding with a different aspect of our team's research. Section 1 includes direct, first hand, research conducted through interviews and focus groups of Willamette National Forest staff and selected volunteers. Section 2 includes case study research that was compiled using a combination of interviews and document reviews. Section 3 includes a collection of equity, diversity, and inclusion resources to be used for future research and program development.

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## SECTION 1:

### Willamette National Forest Staff Consulted:

- Tracy Beck, Forest Supervisor
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- Matt Peterson, Recreation Program Manager
- Suzanne Cable, Sweet Home/Detroit Recreation Staff Officer
- Nikki Swanson, Sweet Home District Ranger
- Grady McMahan, Detroit District Ranger
- Darren Cross, McKenzie River District Ranger
- Tyson Cross, McKenzie River Recreation/Wilderness
- Dylan McCoy, Sweet Home/Detroit Recreation/Wilderness
- Brad Peterson, Sweet Home/Detroit Recreation/Wilderness
- Brian McGinley, Middle Fork Recreation Staff Officer
- Josh Weathers, Sweet Home/Detroit Recreation
- Kevin Rowell, Middle Fork Trails Coordinator
- Brett Blunden, Acting Deputy District Ranger on the Middle Fork District, normally Aquatic programs manager.
- Shane Kamrath, Natural Resources Staff Officer McKenzie River District
- Chris Sorensen, Natural Resources Staff Officer Sweet Home District
- Ruby Seitz, McKenzie District Wildlife Biologist

### Section 1a: Internal Interview and Focus Group Summary

This section synthesizes and summarizes the internal findings about our client, the Willamette National Forest. We gathered information from 11 interviews and 2 focus groups, involving Recreation, Natural Resource, and Administrative staff. The purpose of the interviews and focus groups was to generate conversation and understand various internal perspectives regarding needs for a successful strategy to strengthen existing volunteer programs as well as to expand the programs in the future.

#### Summary of Findings

*Recreation staff* have tremendous appreciation of and reliance on the work that volunteers perform. They have relied on the High Cascades Forest Volunteers for tracking and database management. Moving forward, they envision a centralized, external entity to streamline communication and resources for groups as Forest lacks staffing capacity to handle that. The main focus should be on stewardship and outreach, with the ability to expand breath of programs. The forest currently has many volunteers from the Eugene area, but the Detroit and Sweet Home districts need a broader volunteer base.



*Natural Resource staff* value volunteers, but there is much variability between programs and districts, and lack of capacity to manage from within the Forest. Among existing volunteers, there is also a very broad range of abilities, from first time students to retired Forest technicians. An ideal partner organization would provide trainings and effectively match volunteers to projects. Careful consideration must be made to project timelines, quality control, and compliance. Natural resource staff seek a high level of training, commitment, and consistency in their volunteers.

*Forest administrative staff* understand the importance of volunteers and are eager to support an external group through resources, guidance, and communication. They want to start prioritizing volunteer management and create more cohesive objectives. Big picture goals are to expand outreach, partnerships, and diversity of volunteers and programs. The Forest must allow for the districts to maintain individuality, while uniting in common goals.

- SIMILARITIES BETWEEN STAFF GROUPS

- There is a recognized lack of internal staffing capacity to manage volunteers effectively.
- A need for an external centralized organizing entity to manage volunteer programs.
- Being independent of Federal bureaucracy, a smaller external group will have greater agility for projects and flexibility for utilizing funding sources.
- Strategic planning and prioritization of volunteer programs needs to come from Supervisor's Office.
- Volunteers need a voice in decision making, especially concerning project locations and types. Collaboration is key.
- There needs to be clear lines of communication and organizational structure between volunteers, districts, and Supervisor's Office.
- There is a need to streamline safety, compliance, scheduling, and quality control.
- Existing volunteer groups need to retain a degree of autonomy.
- Volunteers need more recognition for their work.
- There is a need to broaden outreach and diversify volunteer programs.
- Districts need cohesion of structure and objectives for volunteer management, while retaining individuality. For example, mountain bike trails should remain a priority in regions where there is a strong mountain bike community.
- Focus of any external volunteer partner organization should be on stewardship, not advocacy.

- REMAINING QUESTIONS FOR FOREST CONSIDERATION

- What would be the desired scope of a new partner organization? Should it focus on recreation or expand to include natural resources, archaeology, and other fields?
- Will there be any new internal positions created, or solely external partnerships?
- How would this organization be inclusive of all volunteer groups?
- What is a larger priority for the forest:
  - Managing volunteers so as to produce useful work for the Forest?



- Giving volunteers a satisfying and enjoyable experience, regardless of the quality of work they produce?
- Is it possible to strike a balance?
- What role does conservation education have? Should educating the public about the Forest be a priority, and if so, how can volunteers be involved?

*The following outlines in more detail the strengths, challenges, goals, and solutions mentioned by the three different staff groups.*

## **Recreation Staff**

Recreation staff in the Forest consist of people who work on trails, campgrounds, and other recreation related infrastructure. Positions include district rangers, trail crew supervisors, recreation staff officers, and recreation program managers. The opinions of the recreation staff are crucial in the development of a strategy as they are the people who most utilize and rely on volunteers. With this in mind, we completed as many interviews as possible with this group. In total, we completed seven interviews and one focus group comprised of three staff members.

## **Key Findings**

### Volunteer Demographics and Programs

- *Strengths*
  - Several independent volunteer groups complete work that is essential to the Forest, including trail work and trainings, recreation facility repairs, trash cleanup, weed removal, campground hosts, public outreach
  - Many volunteers are dedicated retirees who do high-value work, such as constructing wilderness signs or doing trail work that requires a saw certification.
  - Forest staff work with high value volunteers directly.
  - Strong volunteer base from Eugene/Springfield area.
  - Middle Fork District benefits by having a strong Mountain Bike identity that draws in a lot of young volunteers.
- *Needs/Challenges*
  - Need a ratio of 1:4 (i.e. 1 skilled person to 4 unskilled people on trail. This person can be a Forest staff or a highly trained volunteer).
  - Forest does not currently have the staffing capacity to manage volunteer programs.
  - There is a lack in outreach capacity to reach out, then oversee and manage volunteers. Need to focus on recruitment and retention. Projects must suit the abilities and interests of volunteers.
  - The necessity of the work and the desirability of the work needs to be bridged (e.g. managing human waste is one of the most important jobs on the forest, but the desirability of that job is low).



- Common objectives between the Forest and volunteer groups are a challenge: some groups are happy and willing to step up to complete assigned tasks, while some groups have their own agendas (although can usually work through it).
- Sometimes volunteer work does not necessarily match up with needs of Forest.
- Enough oversight presence is hard. Quality control is difficult and staff capacity for training is hard.
- Compliance with safety requirements (certifications, use of safety equipment, proper tools)
- Difficult to respond to blind calls from individuals who wish to volunteer.
- Detroit District is more remote and struggles to maintain volunteer base.
  
- *Solutions and Goals*
  - There is opportunity for so much more outreach, including partnerships with local schools, mountain communities, and groups in northern cities such as Corvallis and Salem.
  - Limiting amounts of points of contact between volunteers and Forest staff would be ideal. This would help streamline objectives and avoid redundancy.
  - Want increased breadth and diversity of volunteer programs, with focus on stewardship instead of advocacy.
  - Adding a more robust education component is critical.
  - Support volunteers to train volunteers to do needed work safely.

### Communication

- *Strengths*
  - Forest has been able to rely on High Cascades Forest Volunteers for reporting and trainings.
  - For the most part, recreation staff are able to communicate and work well with volunteer trail crews that work in their districts.
- *Needs/Challenges*
  - The current tracking system relies on one individual, Bea Anderson, to process all information in the database. She is retiring this year and no one knows how to use the database. Both volunteer groups and Forest staff alike rely on this system for lack of current alternatives.
  - It can be a challenge to make sure that volunteer groups communicate with each other and with the Forest to ensure that work is not redundant or superfluous.
- *Solutions and Goals*
  - External organization can streamline communication between all volunteer groups and the Forest (hub and spokes model).

### Organizational Structure

- *Strengths*
  - High Cascades Forest Volunteers has been helpful for organizing volunteers.
- *Needs/Challenges*



- High Cascades Forest Volunteers is no longer sustainable as the main organizing force, due to lack of funds and looming retirement.
- *Solutions and Goals*
  - Form a centralized, funded external volunteer management organization that interfaces with and reports to the Forest.
  - A clearinghouse structure/framework of counselors to guide volunteers and groups to participate in work they are interested in doing could be useful. This structure could also create and manage a schedule of work/training events, as well as a database of accomplishment reporting.
  - This clearinghouse would consult with agency staff to create an annual Program of Work.
  - Organization should engage with neighboring Forests and Regional Office.
  - Executive Director should work in the Forest Service Office to help build relationships and have a closely integrated vision.
  - Being outside the Forest Service, the organization could more easily perform: Outreach, Social Media, creative projects, recruitment, education, fundraisers and so on. It would allow flexibility and creativity, and strength.
  - Organization should have ability to house and distribute work and resources. It should staff crews, have crew leaders and lead groups that builds capacity.
  - In the start-up phase, the Forest needs provide seed money, match money, stability for a paid employee through agreement, Challenge Cost Share through agreements etc. Crucial to get that first paid position.
  - A steering committee with agency participation is important. The visioning of the organization needs to be clear about the non-advocacy component, etc.
  - Forest should aid in direction and strategy, highlighting funding opportunities and providing higher level support when possible. This includes recognition, standards, and agreement structure.
  - Existing groups should maintain their own autonomy, but step under the umbrella of the newly formed group. This will aid in efficiency to maximize what the Forest can accomplish.
  - Until there is trust that the organization can show up in the field, the agency needs to show up and show appreciation, buy-in and support at the Forest or Regional level. Even just showing up and voicing support is huge.
  - Alternative idea if Forest can increase staffing capacity: Volunteer coordinator staff position within the Forest (umbrella model). Or each district having a volunteer coordinator that has time and resources available to act as that coordinating person with whatever group takes shape. This role can help grow the diversity of programs, Natural Resources, Fire, Timber etc. This would expand focus to the district level.





## Natural Resource Staff

Natural resource staff are those people who manage facets of the forest such as timber, wildlife, and water. They assess the state of the resources and develop projects to enhance and monitor resources. They use volunteers for work such as restoration and monitoring. We conducted one focus group with district staff officers and received a letter of useful insights from one staff member.

### Key Findings

#### Volunteer Demographics and Programs

- *Strengths*
  - Volunteer use is variable between the different departments. The aquatics program pushes hard to get volunteers, use high school and college students that want to get some experience.
  - Many volunteers that are out there are recurring and don't require as much training. Some are retired Forest Service people who can do tasks like timber surveys.
  - Some work has been done through watershed councils. With students there have been some competitive internship programs that have been very successful.
  
- *Needs and Challenges*
  - Varying level of dedication and interest, especially with high school students.
  - Lots of volunteers are interested in summer programs but there isn't enough internal capacity to train and manage them at that time as it is the primary field season.
  
- *Solutions and Goals*
  - A set of qualifications that people can fit into so staff can pick from a list of volunteers or groups that have skills that are applicable to the needs of a program. Match skills and people to projects.
  - Natural Resources wants dedicated volunteers that don't require recurring training. A great example is a carnivore study and camera trap program: a retired agency worker and his son do most of it. Could do more of this type of thing in the winter.
  - Recognition for volunteers helps too, connection is huge! Something tangible that they can point to or achieve.

#### Organizational Structure

- *Needs and Challenges*
  - Regulatory hoops require so much compliance work and NEPA etc. There needs a parent organization that knows how to navigate that. Volunteers can do the leg work but there needs to be that higher-level coordination.



- Getting volunteers in step with the timing of work and planning, can be a challenge as the agency needs a lot of lead time to get things going.
- *Solutions and Goals*
  - Outside partner would be great. If they can develop and train volunteers that would be fantastic! A central coordinating point would be super helpful.
  - An internal strategy needs to come from the top that gives an initiative to expand work with volunteers. There is too much work to add more projects without a directive.
  - There needs to be a framework that provides reliability and outlines how Natural Resources will work with volunteers.
  - Clear projects and objectives that people can come in and work on and commit to. The agency needs to be able to put that together. Volunteers have to be invested. Clear expectation on all parties.
  - Critical to have a point of contact at the district level who works with volunteers and partners.
  - Planning and Quality Control would need to be agency in house. But volunteers could crew lead if they are experienced and trusted.
  - Encourage leadership to ask each staff employee to consider what they can contribute (build it into performance appraisals). It seems like everyone can do something by bringing on a partner or volunteer.

### **Administrative Staff**

We interviewed three high level administrative staff, including a recreation program manager, the Recreation, Heritage, Lands, and Minerals Program (RHLMP) Staff Officer, and the Forest Supervisor. These key players work primarily at the Forest headquarters and have a broader view of the Forest.

### **Key Findings**

#### Volunteer Demographics and Programs

- *Needs and Challenges*
  - There is a lack of strategic planning around trail work.
- *Solutions and Goals*
  - Increase scope of volunteerism, beyond trail work.
  - Expand outreach to local communities and other urban centers, like Salem.
  - Expand partnerships with educational institutions.
  - Diversify volunteer demographics: focus on inclusion as user and community demographics evolve.

#### Communication

- *Strengths*
- *Needs and Challenges*



- Lack of consistent leadership.
- *Solutions and Goals*
  - Create streamlined system to coordinate volunteers.
  - Forest Service should maintain regular outreach and recognition of volunteers.
  - More centralized, cohesive effort to celebrate and give awards to volunteers.

### Organizational Structure

- *Strengths*
  - Decentralized nature of independent districts is *both* a benefit and a hindrance.
- *Needs and Challenges*
  - Lack of consistent leadership of volunteer program.
  - The Forest has many competing priorities and have not put proper prioritization on volunteer management.
  - Forest Service has a lack of staffing capacity to maintain recreation sites.
- *Solutions and Goals*
  - Self-sustaining Friends group that can coordinate volunteer activities with the districts and match them with Supervisor’s Office priorities and Forest-wide needs.
  - Remove political stigma and show that the USFS is a steward of public lands and not a bureaucratic advisory.
  - Forest can provide physical location to house the partnering organization.
  - Unite all Forest districts in common goals and objectives. Use open-ended strategies to achieve goals.
  - Need culture shift within the agency and a promotion of “shared leadership” and collaborative management. Line officers need to be open to sharing decision space with volunteers and public stakeholders. All parties need to make sure that actions are inclusive and avoid exclusionary programs and always maintain communication.
  - A streamlined hierarchy of Forest staff held accountable to volunteer organization staff.
  - There are no national or regional directives to adhere to.

## **Section 1b: External Focus Group Summary**

The following summarizes the key points collected from the individual worksheet and from our discussion during the Volunteer Focus Group held on February 23<sup>rd</sup>. Fourteen people representing the High Cascades Forest Volunteers, the Scorpions, the Pacific Crest Trail Association, Oregon Equestrian Trails, and the Backcountry Horsemen Association of Oregon attended. Eight other volunteers who represented the Greater Oakridge Area Trails Stewards, Winter Sports Group, and the Pacific Crest Trail Association were invited but were unable to attend. We interviewed them via telephone and/or received worksheet questions that the participants of the Focus Group completed, and their answers are reflected in the Appendix.



## Methodology

The first half of the Focus Group was spent completing the individual worksheet that was designed to get the volunteers thinking about the challenges they face as a volunteer, what they need to be successful in their work, and their vision for the future of the volunteer program on the Willamette National Forest. The second half of the meeting was spent in a group discussion where we deliberated the future of the volunteer program, specifically whether the HCFV was interested in becoming a more formal partner of the Willamette.

## Key Findings

Key findings collected from this Focus Group are that the volunteers have challenges regarding communication between each group and between the groups and the Forest. They also lack the resources and support they need to do their best work in the forest, experience problems with their reporting system, need more volunteers in general, and more robust and comprehensive training. The majority of the volunteers see the future of the volunteer program as a structured “hub and spoke” strategy instead of the “ad hoc” work that is being done currently.

## Key Takeaways and Summary Findings from the Individual Worksheet:

- 1. List 2-3 structural (communication, resource, capacity, logistical, not personal) challenges or opportunities for growth you’ve seen or experienced as a volunteer in the Willamette National Forest.***

### KEY TAKEAWAYS

- **Volunteers need more communication from the Forest Service.** Lines of communication for volunteers in the four districts are different. Some districts have active staff who address and work with volunteers directly. Some do not. Many volunteers often feel like they are not appreciated nor a priority to Forest staff. They also feel like communication should improve so that groups know what trails have been worked on, and which ones are a priority.
- **Volunteers need more inter-organizational communication.** Similar to the communication issues with the Forest, communication between each volunteer organization is lacking. Trail crews will often travel to work on a trail that has already been maintained by another group of people.
- **Volunteer reporting needs to be more robust, streamlined, and updated.** The current reporting system is maintained by one person, and because there are no other volunteers working within the database, reporting errors occur and it sometimes is not updated in a timely manner. It is also clunky and inefficient, and must be more streamlined in the future.
- **Volunteers need more resources from the Forest Service, like tools and radios.** The volunteers often provide their own tools, and they also lack basic communication devices, like radios.



- **Volunteers need more training opportunities.** Volunteers feel like there should be more combined trainings with volunteers from other groups, and that there should be more robust and more frequent training opportunities overall.
- **Volunteer groups need more volunteers.** Aging crews have been a concern among the Forest and the volunteer groups themselves. Volunteer groups feel that to perform the needed work in the Forest, they must increase membership.
- **Volunteer groups need better outreach.** Volunteers feel that to increase the memberships of their groups, they must improve their outreach efforts.

## ***2. What do volunteers need to be successful in their work?***

### KEY TAKEAWAYS

- **Volunteers want to know the Forest Service’s goals, needs, and wants.** Volunteers feel that the Forest must be explicit with the groups about their performance goals, its specific needs, and what they actually want from the specific groups to do their best work on the Forest.
- **Volunteers need more inter-organizational communication.** Volunteers feel that there should be a map or database that outlines which trails have already been maintained.
- **Volunteers need more resources from the Forest Service like tools radios.** In order to do their best work, volunteers feel that the Forest should provide more tools and radios.
- **Volunteers need diverse training opportunities.** In order to better understand the work that is done in the Willamette, volunteers feel that more combined trainings with other volunteer groups would benefit their own group’s work in the Forest.
- **The volunteer reporting database needs to be more easily accessible.** Volunteers need an easier, more functional reporting system. Issues with the current reporting system has inhibited the volunteers from doing work on the Forest efficiently due to overlapping maintenance work.

## ***3. What type of process/strategy/organization do you think would best serve the volunteer needs of the Forest?***

### KEY TAKEAWAYS

- **Having a single point of contact, like an external organization or friends group would best serve the volunteers in the future.** Having “ad hoc” work patterns are not efficient, and it has caused overlaps in work on the Forest. To ensure efficient communication and work distribution, most volunteers felt that having an external organization to act as a clearinghouse for all work would best serve the volunteer needs.
- **Better communication from the Forest Service would best serve the volunteers in the future.** Because communication is inconsistent and sometimes contradictory, the volunteers felt that communication from the Forest must improve in the future.



- **A better way to collect data and report volunteer work would best serve the volunteers in the future.** To prevent overlaps in work, having a better database that would house and organize volunteer data would best serve volunteers in the future.
- **Better outreach would best serve the volunteers in the future.** Volunteers felt that improving their outreach strategies would increase group membership, thus ensuring a smooth succession.

**4. Please make a diagram to show the structure/process you envision (hub, umbrella, etc.)?**

KEY TAKEAWAYS

- **A hub and spoke structure with HCFV, the Forest Service, a volunteer coordinator, or other organization, was most frequently referenced.** Most volunteers would like to see an organizational structure that resembles a hub and several spokes coming from the central hub like a wheel. The central hub would be an evolved HCFV, the Forest Service itself or a volunteer coordinator, or a separate organization altogether. The spokes would be each separate organization.
- **An umbrella, top-down structure was also referenced.** Some volunteers liked the umbrella structure with the Forest Service at the top, directing actions down to the volunteer groups in a more streamlined manner.
- **Some people had no structure in mind.**

Answers from External Focus Group Worksheet

*The following answers were recorded verbatim.*

**List 2-3 structural (communication, resource, capacity, logistical, not personal) challenges or opportunities for growth you've seen or experienced as a volunteer in the Willamette National Forest.**

- Opportunity - the government needs us to husband the resource/fulfill mission and needs to change its cultural acceptance. Lack of interest/dismissal ("too much hassle"), poor planning by agency ("no time/lack of effort"), logistical support ("sign boards, wilderness permits")
- Lack of coordination between groups/group "turf". HCFV website edit cumbersome - discourages updates. No trail work report/trail stats available. Everyone wants to work - not admin. Equipment controlled by individual groups
- Communication with FS - dispatch requirements, reporting. Planning/appropriate manpower for conditions. priorities
- Communication/coordination - what trails need to be worked on - what's needed, what trails have been done. Who's doing what?



- Too many “report to” organizations (HCFV, OET, Deschutes, BLM, Siuslaw, PCTA, Lane Co Parks and State Parks)
- Getting communications during season as to what trail work has been done or not done. Required training to do trail work. Work being done not up to specification that should be for (can’t read) user group specification. Getting updated on ongoing longer-term trail projects.
- Radio communication - reliable radios!!
- Need (can’t read) non-changing logistics. Forest service make a decision and follow through on it.
- Studies and other projects on previous comments!!!
- Sent to work on a trail that was already cleared (communication). Decrease in paid trail maintenance to the point that it is almost all volunteer driven. The cohesive plan is not visible. Often seems ad hoc. Perhaps more coordination between McKenzie and Willamette.
- Better communication - which trails already worked, previously scouted, etc. roads open/closed.
- Better recruiting - need more volunteers, more info of how to get involved
- Problem of aging work crews- their experience is so valuable but replacing them is a challenge.
- Coordination of efforts between groups. A quickly updated database of work done and to be done would benefit as well.
- Volunteers giving more than time - bringing own toolsets. Need a 501(c)3 to be able to take donations from others. I see groups like ONDA and Trail Keepers of Oregon expanding. Need same thing here.
- Many diverse groups volunteer with forest service. Organizations under one umbrella group will be complicated. Trail work is done by many. 25 groups on WNF alone. They each for the most part are already participating through an organized group. As far as trails, scorpion crew wants to maintain connection to trails in each Ranger District.
- Communication - have problems sometimes in the (can’t read) what trails to do and/or what trails have already been worked.
- Communication with groups outside my group (scorpions). Knowing what work they have done so we don’t waste time traveling to a trail that has already been cleared.
- Knowing that we will continue finding more volunteers to do the trail work as older members retire.
- Good communication with the trail supervisors (USFS).
- FS more interested in volunteer service
- A lot is each group works under a separate system, there has never been any single coordination of requirements. Get thrown into whatever system each group uses. There aren’t the systems in place. There is a communication breakdown in the systems. Paperwork volunteers etc.
- Use HCFV volunteer tracking systems, the FS doesn’t share or HCFV does not share that info. So it looks like things are happening in a vacuum. If work is done in GOATS district



GOATS wants to reward them. It all comes down to communication, this goes for work reporting and trail priorities etc.

- Communications. Needs to be a central repository of information. Reporting needs to be timely and communications needs to come both ways.
- There is not enough money to maintain the winter trails and shelters the way we would like to see them cared for. We use a minimum of supplies and volunteers often use their own ingenuity to fix woodstoves, roofs and signs.
- The biggest area for growth with the FS partnership with volunteers is in communication, recruitment – For example, we host kids events where they practice learning how to use a crosscut saw, but not a lot of people know that this is going on.
- General population have a lack of knowledge of wilderness areas and that they could use some help
- One of the things I do as a volunteer is to help sharpen cross-cut saws – most people don't know that there's a need for that, but that is indicative of a larger lack of knowledge. But it's not the FS fault, it's just not one of their top priorities
- But in general, the biggest area for improvement is in getting the word out for youth activities and engagement

### **What do volunteers need to be successful in their work?**

- A plan, interest from the benefactor agency, guidance, instruction to complete job, feedback on work done, correction, or praise.
- Well organized work parties. Training to improve chances of success. Safe work party provided/trained wilderness medicine support. Recognition of work completed.
- Good communication and logistics. Sense that our efforts aren't wasted.
- Training and work is dangerous - need to ensure that everybody has the skills and knowledge to be safe. Tools - work is specialized - cross cut saws, need specialized tools that not everybody has. Opportunities - work days on days that working people can get out. Acknowledgement.
- Training - clear expectations and understanding of what is expected from agency.
- Easy reporting system, hard hats, radios, trail work reporting system.
- Define the plan
- Schedule priorities and allow volunteers to work in a constructive order.
- Communication -both radio and between the different groups. Keep all informed.
- Communication of where the work is - what trails. Assessment of the size of the work, if possible. Tools, safety gear, accessibility to trails. Better communication gear - radios often don't work.
- Good/accurate intel on trail conditions. Tool/gear pool. Radio protocol/training
- Training - on the job is best - just a matter of experience.
- Need annual training to stay certified with Forest Service.
- Support both to help morale and (can't read) trail from the FS. Consistency and continuity in leadership and support (from the FS). Leadership they can depend on.





- Designate a goal, what needs to be done to accomplish that goal and an evaluation to see how we might do a better job.
- A sense of joy in whatever work we get done.
- Dedication, time, energy, enjoy outdoors
- Good working relationship on the district level, doesn't need to run everything by them, on big jobs walk throughs happen and scoping happens. FS don't supply GOATS with anything this is different on different districts. So some form of project support to support volunteers and volunteer effort supplied by the FS. More volunteer specific support on a project level. Something like porta johns for large projects.
- We need supplies for the winter trails. Diamonds, nails, signs, lettering for signs, poles for diamonds where there are no trees. Lag screws and washers for signs.
- Support from the forest service when it comes to delivering supplies at our September work session on the trails.
- I know that FS has budget constraints, but a dedicated staff member whose job is just to work with volunteers would be great. We need someone available 5 days a week. They would be used for coordination and scheduling.
- For example, there was a discussion of crosscut saw recertification happening at a high level of the FS, but this info takes forever to get down to the volunteers, I'm not sure if I will be able to do recertifications this upcoming season because I didn't hear about them soon enough.
- I know that for the current point of contact for volunteers, we're not their primary priority. They have a bunch of other jobs that they need to get done and we're just a small part of that. So we need someone that is dedicated just to the volunteers entirely
- It could even be a coordinator for all 3 forest in the area, which could still work.
- But to be clear, things haven't been unsatisfactory, it's working but if there was more dedication it could make things better.

**What type of process/strategy/organization do you think would best serve the volunteer needs of the Forest?**

- Cultural acceptance of volunteers at all levels of management, a friends organization - at a holistic level could serve as a clearinghouse/insulator from individual volunteers.
- Dedicated admin support/database management and update. Organized by function rather than geography.
- Something similar to how HCFV has functioned. Organizational units coordinated and working together as appropriate collaborating with one another logistically semi-autonomous.
- Coordinated/centralized through forest service
- Communication with other forest agencies
- Something that will bring recreation staff (can't read) offices and forest and volunteers together to work on our trail system together. Ability to go after grants for getting projects done.



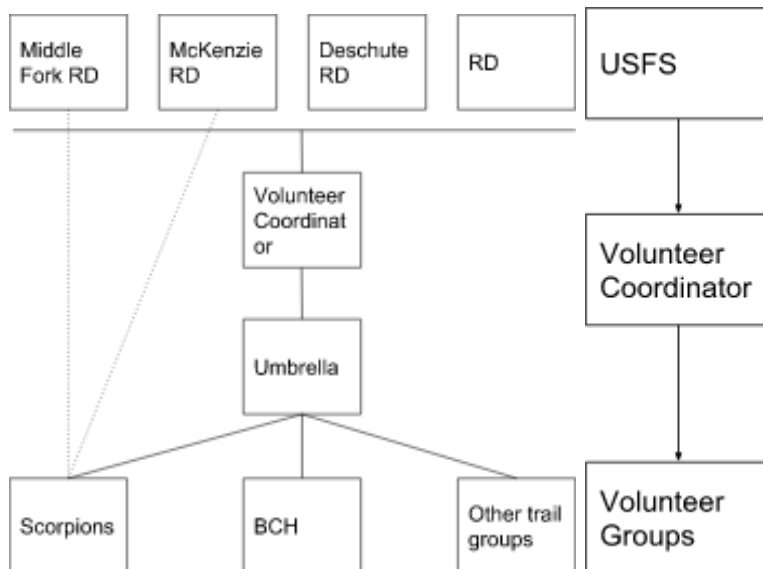
- Advertise, have signs at trailheads
- Single point of contact for volunteer coordination and tracking. Could this be inside the FS?
- Communication process after each work trip. Getting info to every group.
- A 501(c)3 umbrella or hub coordinating efforts
- I need to know what forest service wants as far as a volunteer program. Do they have bigger ideas like nonprofit working for grants to get supplies and work done? I am mostly interested in trail work and staying focused on that.
- Central hub for gathering and passing back info. Input from volunteer group to FS then output from volunteer group.
- Good data collection for volunteer hours. USFS setting up a chart that triages their trail needs.
- Something that would bring all volunteers a structure to work under.
- More FS presence and recognition. Thinks that the FS forgets that there are volunteers. A new external organization to do all this would be amazing! Someone that would provide support, do the paper work, keep track of things, transfer funds deal with some supplies etc. That would be great.
- An organization that can generate the money to support each programs needs for supplies, data base and coordination efforts.
- I think some recognition of volunteers' work by the FS would be nice. I mean you have to do this work because you love it not for the recognition. But I think some form of recognition from the FS would help with motivation from volunteers. The FS has done some things to acknowledge volunteer work but haven't done enough in my opinion.

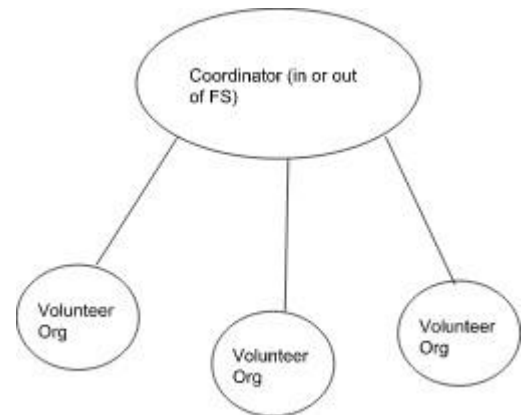
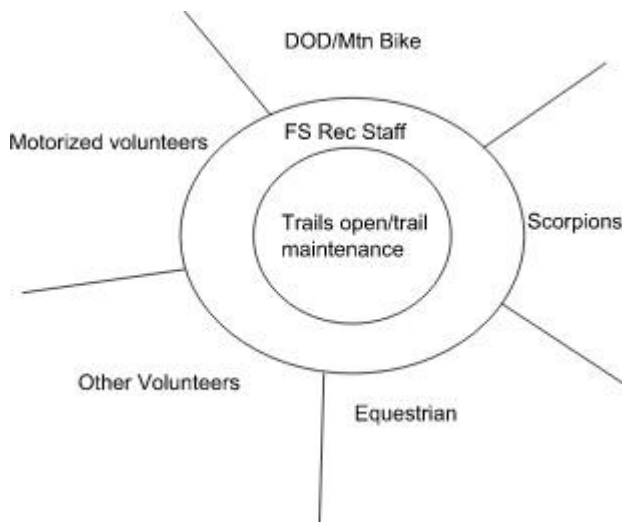
**Please make a diagram to show the structure/process you envision (hub, umbrella, etc.)?**

- I am concerned that the USFS buy-in will not be all inclusive by all mid and upper level managers who oversee other resources besides trails. I want HCFV to be a wide-ranging group (biology, archaeology, etc), not just trails group!
- \*note: PCTA works well
- Admin - record keeping, roster, media, legal
- Training -
- Equipment -
- Coordination between groups
- 5-person committee
- Communication
- I don't have a concept of organization in mind.
- I support the idea that was generated in our first meeting with Jennifer. That was a wheel with the spokes being the different volunteer organization all feeding their information into a central hub which is where the data base person and the overall coordinator of the volunteers reside. Requests for materials and supplies or forest service support would go through the hub.



- I think the HCFV has always put the trails focused groups first, like the goats & DoD, but recently I see priorities changing and the mountain biker groups are getting the most attention. It makes sense, the mountain bike groups are younger and have the initiative and the money to do some things on the forest. But if there was an official nonprofit organization that was an umbrella for all the different groups I'm nervous that the trails groups would not be the priority. I actually would like to see the HCFV become a nonprofit but only if it stays true to what it was intended to do, to organize all the different trail groups. I just don't want to see the trails groups lose anymore voice that they've already lost.
- (Hub and spoke diagram)
- (Hub and spoke diagram)
- (Hub and spoke diagram with FS as the hub)
- (Hub and spoke diagram with HCFV as the hub)
- (Hub and spoke diagram)





### FINDINGS FROM THE GROUP DISCUSSION

Much of the group discussion revolved around the Forest Service’s role in supporting the HCFV succession plan. There was an acknowledgement that HCFV is experiencing growing pains where there is pressure coming from the outside-in instead of growing from the inside-out. Most non-profit groups, for example, form from a strong and passionate nucleus from within a particular group. These people feel a shared drive to develop a non-profit, and they go on to form a board and create by-laws and so on. The bottom line is that most groups formalize their organization by developing a non-profit because there is a drive to do so from within. What the HCFV is experiencing is a push from outside entities to formalize their organization. Instead of the inside-out growth, a couple of members and the Forest Service are the primary driving forces that are pushing for the group to be formalized. Many volunteers had concerns about maintaining autonomy because some volunteers feared that forming an external group would remove the direct line of communication to the Forest, and some individuals rejected the idea of having HCFV being in charge of other groups’ work. Some volunteers felt that the Forest Service should be in charge of the volunteer groups to prevent potential conflicts. Additionally, group members expressed concern about a top-down structure impacting the way groups perform work. Existing groups wish to continue doing work on the ground, and many people do not have desire to do administrative work. The group also felt that there needed to be consistency with the directives and expectations between the districts with regards to goals and expectations of the volunteers.

Jennifer Sorensen pushed the group to explore what *exactly* they wanted in terms of their future and whether or not there was potential for a more formal organization to emerge and assist with implementing this strategy. . Many of the volunteers were hesitant to entertain this notion because the Forest’s objectives and goals change according to revolving leadership, and because they felt like they didn’t know what the Forest wanted from them.



These concerns, we assured them, would be addressed in another meeting with volunteers and Forest staff in April.

*Update as of April 3, 2018: Following this focus group meeting, a subset of existing volunteers decided to work toward formalizing the HCFV group into a non-profit organization with the intent of supporting the WNF with the goals outlined in this project. Consequently, the structure of follow up meetings has evolved and plans include sharing of the volunteer strategy with the volunteer steering committee and new potential HCFV partner organization, as well as a workshop later in the spring to review and gain further insight into key components of the strategy.*

### **External Partner Group Conclusions**

Many of the issues the volunteers experience while working in the Willamette National Forest are lapses in communication and coordination from the Forest Service and other volunteer groups, a lack of resources, and reporting issues. Ways to improve volunteer conditions in the future are by creating a single point of contact by having an external organization or friends group to help communication and coordination, developing a better way to collect data, prioritize goals, and report volunteer work, and improving outreach.



## **SECTION 2:**

### **Case Study Summaries**

This section synthesizes and summarizes external partner and National Forest Unit case studies.

### **Section 2a: Friends Group Case Studies:**

A Friends Group, as we are defining it, is any 501c3 or affiliated non-profit entity that is an active partner to a National Forest unit. An active partner can take many forms but, in this case, it means an entity that coordinates, manages, recruits, and tracks volunteers and volunteer activity, employs their own field staff, or a combination of the two. Volunteer activity includes but is not limited to:

- Boots on the ground stewardship work such as trail work and invasive species removal.
- Outdoor education programs.
- Monitoring programs.
- Ecological restoration programs.
- Exploration and outings programs.

We have conducted a series of interviews and brief case studies of existing non-profit friends group organizations to identify best practices in the sector.

**\*\*Note:** for the purposes of easy interpretability the terms friends group and partner organization are used interchangeably, however friends group is the preferred term for the purposes of this project.

### **Friends/Partner Groups Examined:**

As of, June 13, 2018 we have interview data, direct information, and documents from the following groups:

### **Full case Study:**

- Friends of the Inyo.
- Siskiyou Mountain Club.
- Friends of the Central Cascades Wilderness.
- Bob Marshall Wilderness Foundation.
- Friends of Nevada Wilderness.
- San Juan Mountain Association
- Friends of Fish Lake
- Mt. St. Helens Institute
- Selway Bitterroot Frank Church Foundation
- Southern Appalachian Wilderness Stewards
- Northwoods Volunteer Connection
- Discover Your Forest

**Targeted Case Study:**

- Pacific Crest Trails Association
- Poudre Wilderness Volunteers
- Greater Oakridge Area Trail Stewards
- Truckee Trails Association

**Common Themes:**

All the organizations we have examined share a similar structure and fund their work in similar ways. Primary differences are mostly related to scale of projects undertaken, chosen working area, and size.

The following are the common best practices that have emerged from our research:

- Diversify funding from a range of different sources including individual donations from membership, grants (project specific, development, or capacity building), work agreements with federal agencies, purpose driven fundraising campaigns, community or corporate partners.
- Encourage higher-level administration staff, Executive Director, Operations, etc. to focus primarily on development and organizational sustainability tasks, when possible. In the initial stages of organizational formation, the Executive Director, or other early staff, will be responsible for a variety of tasks. Short and midterm funding goals should be the ability to hire and support additional staff for programmatic functions. Program Level staff administers the day to day function of project work, volunteer management, and project level budgets and tracking.
- Develop a clear and concise non-advocacy mission.
  - Successful stewardship and capacity adding organizations have an assistance-based mission. Advocacy can be adversarial and political (overt or otherwise) which can make it difficult to partner. Groups that do engage in advocacy need to create a clear programmatic and funding firewall between advocacy actions and other programs and partnerships.
- Create clear agreement and communication structures with partners, Agency or otherwise.
  - Codifying working relationships and communications strategies provides a frame work that can survive turnover and temporary disagreement.
    - Memorandum of Understanding, Master Challenge Cost Share, and other program or project level agreements should contain communication and partnership language. Regular meeting schedules and chain of command information needs to be formalized.
- Develop a database to track volunteer work, accomplishment information, donor information, and funding.
  - Database tracking differs across the sector. Larger organizations may use multiple systems depending on what they are tracking and smaller organizations may use simple spreadsheet based systems.
    - Accomplishment reporting may be tracked via a custom database format via. Google, Microsoft Access, or Excel. Volunteer hours, contact,



- membership, and records via Volgistics, Nation Builder, Giftworks, or another Customer Relationship Management (CRM) platform.
  - Currently there is not a single one size fits all method.
- Develop scalable outreach platforms and ample use of social media are the most functional way to reach and attract new volunteers.

**See Section 2c for table of attributes and individual partner profiles.**

## **Section 2b: Agency Case Studies:**

The following summarizes the key findings resulting from interviews with various US Forest Service staff members on units outside the Willamette National Forest regarding the state of their respective Forests' volunteer force. The CSC Forest Service Team is conducting National Forest case studies to research and identify best practice in volunteer management across multiple Forests throughout the United States. Participating Forests include:

- Deschutes National Forest
- Okanogan-Wenatchee National Forest
- Mt. St. Helens National Monument – Gifford Pinchot National Forest
- San Juan National Forest
- Siuslaw National Forest

### **Methodology**

Information was gathered via phone interviews of Forest Service staff members lasting 30 to 60 minutes in length. Interview participants were asked to provide information on:

- Forest Overview and Background
- Volunteer Programming and Management Practices
- Agreement Structures with Partnering Organizations
- Partner Organizations

### **Conclusion**

There are many models that can be employed to meet the needs of a volunteer program. Based on our case study research and our interviews with stakeholders on the Willamette National Forest a hub partner organization that is able to coordinate tracking, communications, and forest needs is the best path forward. Ensuring any new organization continues current HCFV<sup>1\*</sup> tracking functions is crucial but building in growth strategies to allow the organization to grow to include larger outreach and coordination functions is also vital. The forest can help guide the formation of any partner organization by providing specific project level funding and programmatic funding through cost share agreements and maintaining constant communication with partner leadership.

The Willamette National Forest should assist any potential partner group expand their mission beyond just accomplishment tracking and always ensure communication of needs and

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<sup>1\*</sup> High Cascades Forest Volunteers





expectations is clear. It is our recommendation that early in the partnership an MOU is drafted to codify the partnership and help it move forward and grow.

**See Section 2d for USDA Forest Service attributes and individual unit profiles.**

### **Additional Forest Service Personnel Informational Interviews:**

Several additional interviews were conducted with USDA Forest Service officials from Region 6, Region 3, and Region 1 in order to collect relevant information included in final report.

**Jimmy Gaudry, Region 1, Wilderness, Wild and Scenic Rivers, and Guides Program Manager**  
Interviewed about partnership best practices.

**Ralph Swain, Region 3, Regional Wilderness and Rivers Program Manager**  
Interviewed about partnership best practices.

**Brenna White, Region 6, Conservation Education Partnership Specialist**  
Interviewed about diversity, equity, and inclusion programs.

**Emily Biesecker, Region 6, Volunteer and Service Program Manager**  
Interviewed about diversity, equity, and inclusion programs.

**Randy Welsh, Former Washington Office Wilderness and Wild and Scenic Rivers Lead and Recreation Lead, Currently Executive Director National Wilderness Stewardship Alliance**  
Interviewed about partnership best practices and agreement structures.



**Section 2c: Table 1: Partner Group Attributes.**

<b>Group Name</b>	<b>Budget</b>	<b>Staff</b>	<b>Board</b>	<b>Programs</b>	<b>Tracking Protocol</b>	<b>Funding/ Partnership Structure</b>
Friends of the Inyo California	\$400,000 to \$600,000 annual depend on project load.	ED, Outreach, Operations, Stewardship, Preservation,  Seasonal Stewardship Crew Staff	11 spaces. 5 current members  Officers and committees  Board engaged in development and advisory tasks	Stewardship, volunteer programs, professional crew programs, exploration and education programs.	Salsa CRM* for member/donor records, and volunteer time.  Google Forms/sheets for accomplishments and project tracking.	Multi agency partnerships built through agreements. Forest Service MCC. Other programs Grant and donation Funded
Siskiyou Mountain Club Oregon	\$180,000 annual	ED, Field Director, Membership Coordinator  Seasonal Corps Crews, Seasonal Stewardship Crews	8 board members  Officers and committees  Boards engaged in development tasks	Stewardship, internship and educational partnership, professional crew and restoration project.	CRM tracking of donors and volunteer hours.  Spreadsheet tracking for accomplishments	Forest Service Partner. MCCS and volunteer agreement. Other programs are grant and donation funded



Friends of Central Cascades Wilderness Oregon	Varies annually, very small \$5,000 or less	All Volunteer	Board composes central program roles. Act as staff	Stewardship and trail work	Track through Discover Your Forest  Discover Your Forest uses Volgistics and spreadsheet tracking	Has personal relationship with agency and works through discover your forest. Occasional agreement when projects necessitate it.
Bob Marshall Wilderness Foundation Montana	\$250,000 annual	ED, Program Director, Outreach Coordinator, Program Coordinator, Stewardship Coordinator	8 Board members, sit on committees, outside committee members allowed.  Board responsible for development tasks	Stewardship, trail work, volunteer project coordination for the five forests that administer the Bob Marshall Wilderness complex	Direct tracking in conjunction with the Forest Service.  Mix of CRM and custom tracking  BMWf shares office space with the USFS.	Forest Service Partner. Mutli Forest. Bob Marshall Wilderness Complex Specific. MCCA that is carried across multiple forests.  Regular agreement maintenance
Friends of Nevada Wilderness Nevada	\$1.4 Million annual	14 Staff Members in two offices. ED, HR, Programs, GIS, Outreach.  Seasonal Stewardship Crew Staff, Interns	11 Board members  Major donor and development tasks  Advise advocacy tasks, and organizational structure.	Stewardship and Wilderness Restoration, Outreach and Education.  Advocacy, clearly delineated from stewardship activities.	Large Org. tracks with custom data base for projects, Volgistics for certain volunteer info., Nation Builder for other information.	Multi agency partner. BLM, USFS. Works through agreement. Strong Advocacy arm kept separate. Work that is not funded via agreement funded through donation and grants.



<p>Discover Your Forest Oregon</p>	<p>\$300,000+</p>	<p>ED, Volunteer and Education Program Director, Retail Manager, Conservation Education Team (3 staff), Seasonal staff</p>	<p>As a sub program of Discover Your Northwest (DYNW), Discover Your Forest acts under DYNW's Board.</p>	<p>Education, Outreach, Retail, Exploration, and volunteer tracking and coordination</p>	<p>Volgistics and custom spreadsheet tracking for accomplishments</p>	<p>Official Partner Group of the Deschutes National Forest. They operate under Discover Your Northwest who maintains agreements and has a Regional Cooperating Agreement. Partnership primarily codified through MCCA. Other funding comes from retail, donations, grants, and rental revenue from cave light rental at Newberry Volcanic National Monument.</p>
<p>San Juan Mountains Association Colorado</p>	<p>\$1.4 million annual</p>	<p>12 staff. ED, Cultural Program Director, Volunteer Program Director, Education and Outreach Director, bookstore staff</p>	<p>Regular executive board. Currently 6 members, executive committee and at large</p>	<p>Conservation, Science, and cultural education. Visitor information. Provides clearing house function for all volunteers work on the forest. Alternative SB and Adopt-a-programs</p>	<p>Volgistics. SJMA also collects and compiles information from other groups</p>	<p>Funded via grants and agreements. Operates as an interpretive assoc. Shares office space with the Forest/BLM through agreement. SJMA sells x-mas trees as fundraiser</p>



<p>Mt. St. Helens Institute  Washington</p>	<p>\$800,000 annual</p>	<p>6 year round, ED, Education Director, Science Director, Volunteers Programs Director, Admin. 13 seasonal Crew</p>	<p>15 member board. Executive committee, and advisory/fundraising roles</p>	<p>Conservation and Science Education. Interpretation. Works to survey and monitor natural resources on the Monument. Data tracking for other orgs.</p>	<p>Volgisfor, MHA also compiles information for other groups</p>	<p>Funded via grants and agreements, earned income, and fundraising. They share office space with the Forest via agreement. Operate as interpretive assoc.</p>
<p>Friends of Fish Lake  Oregon</p>	<p>\$10,000-\$20,000 annual  Reserve varies</p>	<p>All volunteer and board driven</p>	<p>12 member board. Executive committee and at large.  Board performs daily functions and acts as staff</p>	<p>Heritage and cultural resources maintenance of the recreation site. Looking into interp and ed. programming</p>	<p>Paper tracking</p>	<p>MOU with the Forest. Funded via grants and member dues.</p>
<p>Northwoods Volunteer Connection  Minnesota</p>	<p>Unknown</p>	<p>Part time ED, seasonal intern.  Board fills other roles</p>	<p>6 member board. Steering and executive committee</p>	<p>Working to develop. Primarily coordinates short term individual volunteers. Partners with other groups to facilitate funds.</p>	<p>Tracks hours via spreadsheet, Forest tracks other groups directly</p>	<p>Master Volunteer Services agreement with Forest.</p>



<p>Southern Appalachian Wilderness Stewards</p>	<p>\$850,000</p>	<p>8 Staff. ED, 3 Program Managers, Lead Wilderness Ranger, Finance and Admin, Development 30 seasonals</p>	<p>15 member board. Executive Committee, fundraising and support function</p>	<p>Stewardship and education functions. Primarily with paid crew and Corps staff. Some unique volunteers. Alternative Spring Break and day programs. Education and interp at several historic sites. Larger training focus, hosts a regional skills training yearly.</p>	<p>Searchable spreadsheet. Does not track many individual volunteer projects. Mostly crew work</p>	<p>Regional MOU, Master Challenge Cost Shares. Grants agreements and fundraising</p>
<p>Selway Bitterroot Frank Church Foundation  Montana/Idaho</p>	<p>Unknown, Approx. 60% funded via agreement</p>	<p>3 primary staff. ED, Programs, Communications. 8 Crew 8 Interns</p>	<p>16 member Governance Board, primarily responsible for development functions</p>	<p>Stewardship and volunteer mgmt. focus. Interns work directly with Forest as staff and are trained in protocol. Crews act as stand alone crews and as volunteer support</p>	<p>Tracking matches INFRA as much as possible using Excel</p>	<p>Multiple Forest/Regional level Master Challenge Cost Share to facilitate shared office space and tools.  Grants, and fundraising.</p>



## Friends Group/Partner Group Profiles:

### Friends of the Inyo:

#### Profile:

Friends of the Inyo is a membership based organization located in Bishop, CA that was formed in 1986 in response to a Forest Planning process. They functioned as an all volunteer board driven group until 2000 when they hired their first staff to perform road and grazing related monitoring tasks. They currently work through agreement with the Inyo National Forest, the Sierra National Forest, the Bridgeport District of the Humboldt Toiyabe National Forest (the only segment of that National Forest in California), the Bishop Field Office of the BLM, the Ridgecrest Field Office of the BLM, California Department of Fish and Wildlife, and on occasion Death Valley National Park.

#### Staffing:

Friends of the Inyo currently has five full time year-round staff members.

- **Executive Director;** responsible for higher level development tasks, donor cultivation, fundraising, organizational agreement and partnership development and approval, budget development, and outreach development.
- **Stewardship Program Director;** responsible for all field programs and on the ground work. This includes all volunteer coordination and tracking, management of professional crews, volunteer crews, and intern crews; programmatic and project level agreement structuring, development, and tracking; and budgeting and reporting tasks related to field and stewardship programs.
- **Outreach Manager;** responsible for development and dissemination of outreach materials, development of education materials and programs, maintenance of the website, newsletter, and social media. Assists with membership and donor cultivation.
- **Operations Manager;** responsible for everyday functions, financial management, payroll, and human resources tasks. Assists in budget development, grant and funding source identification, and tracking expenses.
- **Preservation Manager;** responsible for legislative and conservation advocacy tasks, manages distinct funding area and program separate from stewardship. Engages with conservation partners.

#### Programmatic Focus:

Friends of the Inyo has three distinct program focuses.

- **Preservation.** Independently funded from other programs. Advocacy based. Focuses on conservation and legislative issues that affect public lands.
- **Exploration.** Aimed at getting people out and exploring public lands in the Eastern Sierra. Performs education and outreach functions. Does not provide on the ground work and is largely an interpretive program that supports other programs and is a development tool.
- **Stewardship.** This is the largest program area in terms of staffing and budget. Employs seasonal crews, interns, and volunteers to work on mutually identified stewardship, monitoring, and restoration tasks on public lands.



### **Funding and Agreements:**

Friends of the Inyo is funded through a combination of grants, agreements with federal agency (and other) partners, and individual donations through membership and specific fundraising activities. Restricted project funds come in the form of grants and agreements. Overhead, administrative funding, and unrestricted funding comes from a combination of foundation grants, membership donations, and overhead costs written into project specific grants.

Friends of the Inyo partners with land management agencies through agreements and over 30 years of trust building activities.

- US Forest Service Master Challenge Cost Shares, Supplemental Agreements, Master Volunteer Agreement, and regular communication. A Memorandum of Understanding is in the draft stage.
- BLM Memorandum of Understanding with both field offices Friends of the Inyo works with that outlines communication strategies and working relationships. A Financial Assistance Agreement is in place with the Bishop BLM Field Office that facilitates the transfer of funds on a project by project basis.
- Other agreements with other partners outline communications and working strategies.

### **Budget:**

\$400,000 to \$600,000 annually depending on program load. \$518,000 in 2017

### **Tracking:**

Friends of the Inyo tracks volunteer and on the ground work via a google forms and google sheets data base for project specific accomplishment tracking and in Salsa CRM for member donor and outreach tracking.

## **Siskiyou Mountain Club:**

### **Profile:**

Siskiyou Club was founded in 2010 by a group of dedicated volunteers that were intent on restoring a single trail corridor in the Kalmiopsis Wilderness area. From their it has grown into a full-fledged stewardship group dedicated to restoration and maintenance of trails in the Siskiyou OR backcountry. They work primarily with the US Forest Service in the Siskiyou National Forest but also works with the Siskiyou National Monument and other agencies. They focus primarily on backcountry trail and restoration work.

### **Staffing:**

- **Executive Director;** focuses on development, human resources, staffing management, and agreement structuring and management along with fundraising and member donor cultivation. Does, at times, participate in on the ground programs.
- **Field Director;** Full time year round. Directs and coordinates field programs responsible for HR tasks and hiring of seasonal crews and staff. Responsible for development and management of field and work programs, volunteer coordination, and training.
- **Membership Coordinator;** part time, responsible for admin assistance and membership related program development and implementation.

### **Programmatic Focus:**

The Siskiyou Mountain Club is a stewardship focused organization. It has three focal areas:

- **Wilderness Conservation Corps:** A full time summer intern crew with an educational partnership. There is a partnership with Southern Oregon University that allows





students to work for credit. Other interns are eligible for scholarships that can be used at any accredited public institution upon completion of the program. This program is funded through targeted fundraising.

- **Fire Recovery Crew:** A full time restoration crew funded through agreement with the National Forest to work on wildfire recovery efforts.
- **Volunteer stewardship:** Open and sign up based volunteer work projects and hikes.

**Funding and Agreements:**

Siskiyou Mountain Club is funded through grants, agreements with federal agencies, and individual member donations along with targeted fundraising. They also sell maps and other related merchandise for donation on their website. Their relationship with the Forest Service is codified through agreements; Memorandum of Understanding, Volunteer Agreement, and Master Challenge Cost Share along with Supplemental Agreements. In each of these agreements project specific communication structures are established and project parameters are laid out. The MOU provides a master framework for how the organization works with the agency. Personal relationships also go a long way and trust has been built.

**Budget:**

\$180,000 Annual.

**Tracking:**

Siskiyou Mountain Club tracks their volunteer work using project specific data base tracking and end of the year reporting needs of the forest service. They track membership and donations through a CRM platform.

**Friends of Central Cascades Wilderness:**

**Profile:**

The Friends of the Central Cascades Wilderness (FCCW) is an all-volunteer driven organization that is focused on working within designated wilderness managed by the Deschutes and Willamette National Forests. The bulk of their work takes place on the Deschutes. FCCW was formed in 2013 and became a non-profit in 2014. It was formed by a group of concerned citizens to care for what they saw as deteriorating Wilderness character and conditions on National Forest Lands. Their primary mission is boots on the ground stewardship work in Wilderness, trail work, some restoration work, and other associated Wilderness Character related projects. The bulk of their work is back country and multi-day outings. Their primary volunteer base is in Bend.

**Staffing:**

There is no paid staff at FCCW, they are driven by an all-volunteer board that run the organization and programs. Board members are responsible for leading hikes and work trips, planning projects, and tracking.

**Programmatic Focus:**

FCCW is focused exclusively on boots on the ground stewardship work.

- They do host some hikes and interpretive functions.
- The bulk of their work projects are multi-day and remote.

**Funding and Agreements:**

FCCW began as a meetup.com group and grew from there. In the initial stages they were an all membership organization that gave members voting ability in organizational decisions. This



proved to be unworkable and they have since transitioned to a voting board and member sponsor model where members sponsors are able to donate and are given ability to elect board members. They have received generous corporate foundation support in the past from Microsoft and currently rely on member donations and Forest Service funds for project level work as well as small grants and local business partnerships.

**Budget:**

Varies annually depending on donation and agreements. Very small \$5,000 or less.

**Tracking:**

FCCW tracks through Discover Your Forest who coordinates most of the volunteer tracking for the Deschutes National Forest.

**Bob Marshall Wilderness Foundation:****Profile:**

The Bob Marshall Wilderness Foundations (BMWF) serves as the volunteer project clearing house for the Bob Marshall Wilderness Complex which is administered by five separate National Forests. They were formed by a partnership driven by both a group of concerned citizen and Forest Service personnel who saw a need for increased on the ground work capacity. BMWF was formed from an existing group of citizens that began in the 1980; however, they did not formally incorporate as BMWF until 1997. They started small and with initial grant and Forest Service Agreement (MCCS) funds were able to hire a part time Executive Director. Programs grew from there and are supported through agreement by all five forests that administer part of the Bob Marshall Wilderness in proportion to the amount of wilderness they manage, and the amount of work done in the various districts. The board is active and does assist with work but is primarily responsible for development and fundraising tasks.

**Staffing:**

- **Executive Director**, full time year round, responsible for administration, HR, development and higher level agreement maintenance.
- **Program Director**, full time year round, responsible for planning and managing field programs and projects along with crews.
- **Outreach coordinator**, full time year round, responsible for outreach material development, communications, and promotional material.
- **Program coordinator**, part time seasonal, assists the program director in managing programs and seasonal crew staff along with volunteer projects.
- **Program assistant**, part time seasonal, assists program coordinator.
- **Seasonal crews and interns**, responsible for on the ground work with staff and volunteers

**Programmatic Focus:**

BMWF is almost 100% stewardship focused and other activities, including outreach events, film festivals, and public gathering events are designed to support stewardship functions. They have multiple stewardship program focuses.

- **Intern Crews and intern rangers**. These individuals are paid and supported by BMWF but are embedded directly with the Forest Service and receive job training and skills training.



- **Intern Wilderness Corps Crew.** A distinct crew that does work all around the Wilderness complex.
- **Seasonal Crew Leaders/Volunteer program.** 4 Seasonal crew leaders work with volunteers to complete pre planned projects that have been identified by Forest Service staff.
- **Pack Stock training and intern program.** This program is focused on pack stock and packing skills. It pairs interns with experienced packers which then support other work activities throughout the work season. They receive training at the Nine Mile Training Center.

BMWF administers nearly all of the volunteer work that happens in the Bob Marshall Wilderness with the exception of work done by the Back Country Horseman and the Continental Divide Trail Coalition. Volunteers are able to sign up online or design their own volunteer program. They are required to place a deposit that is fully refundable, or donate-able, upon completion of the project. Partners and volunteers are also able to “adopt” a project from a menu of preplanned work. Specially planned or sponsored projects are used as a way to accomplish targeted work and each project is planned and led by experienced stewardship staff.

#### **Funding and Agreements:**

BMWF is funded at roughly 50% grants and agreements, 25% membership donation, and 25% funds raised at fundraising events. They share an office with a Forest District and work primarily through Master Challenge Cost Shares. They have a unique situation in which they work on an area administered by five different National Forests. They work under one master agreement that is administered for all five forests and each forest attaches funding to the master through a supplemental at an amount based on the proportion of the wilderness they manage. BMWF does work in each district according to the same proportionality system. They enjoy lots of support from the forest and are the go-to organization for volunteer work in the Bob Marshall Wilderness.

#### **Budget:**

\$250,000 Annual.

#### **Tracking:**

BMWF tracks volunteer work through a mix of CRM programs and custom databases. Since they work directly with and in a Forest Service office transfer of information is more streamlined.

### **Friends of Nevada Wilderness:**

#### **Profile:**

Friends of Nevada Wilderness (FNW) was formed around wilderness advocacy and designations and grew to incorporate stewardship. They have grown their stewardship program into a statewide initiative that encompasses two offices, Reno and Las Vegas. They still actively participate in advocacy, but it is distinctly separate and does not influence or mix with stewardship activities. They also work with both BLM and Forest Service lands across the entire state of Nevada. They focus primarily on lands with a special designation. Forest Service Wilderness and Roadless Areas, BLM National Conservation Lands, and BLM managed National Monuments.

**Staffing:**

FNW has a very large staff spread between two offices, Reno and Las Vegas.

- **Executive director**, full time, responsible for development, agreements and higher level partnerships, advocacy campaigns, and organizational oversight.
- **Associate Director**, full time, assists ED and HR administer organizational functions.
- **Human Resources and Finance Director**, full time, responsible for HR and financial management, including payroll, grant management, and budgeting.
- **Stewardship Program Director** (Northern Nevada) full time, responsible for directing stewardship activities out of the Reno Office.
- **Southern Nevada Program Director**, full time, responsible for southern Nevada programs.
- **Southern Nevada Program Coordinator**, full time, responsible for assisting the S. Nevada director
- **Stewardship Coordinator**: Southern and Northern Nevada (two positions) responsible for assisting the regional stewardship program.
- **Membership and Design Coordinator**, full time, responsible for the development of membership materials and outreach materials as well as member support.
- **GIS and Monitoring Coordinator**, full time, responsible for GIS and monitoring programs.
- **Inventory Coordinator**, full time, responsible for field inventory and monitoring programs.
- **Communications and Operations Coordinator**, full time, responsible for assisting with communications and general organizational tasks.
- **Seasonal Forest Service Program Coordinator**, responsible for FS coordination.
- Seasonal interns and Crews. Assist with on the ground stewardship and monitoring work.

**Programmatic Focus:**

FNW has a very wide programmatic focus:

- **Advocacy, distinctly separate from stewardship.** FNW actively advocates for increased wilderness and special designation on lands in the state of Nevada.
  - Despite this, they have a fantastic working relationship with Nevada land management agencies that has been built through trust and strict agreement structures.
- **Inventory and monitoring.** FNW engages in a variety of inventory and monitoring programs based on the needs of the land management unit in questions. Invasive species monitoring, boundary monitoring, and route inventory are common.
- **Outreach and education programs** that work with local business and institutions along with media to inform and educate the public about public land resources in Nevada.
- **Stewardship.** Working with land managers, FNW engages in a wide variety of stewardship programs and projects that range from camp site clean-up to invasive species removal. They have the capability and skill to meet most stewardship needs on public lands, with a particular focus on Wilderness.
- **Internships and crew programs.** FNW works with Corps crews and professional crews to accomplish work.

**Funding and Agreements:**

FNW is funded through agreements, grants, membership donation, corporate partnerships, and fundraising events. They have a nearly \$1.4 million annual budget that supports their work. They partner with the BLM through primarily reimbursable agreements which allow them to complete work and then bill the agency for that work according to the agreed upon scope. Grant funding comes from foundations primarily along with a handful of smaller grant making organizations. Unrestricted funds come mostly from billed overhead in other agreements or member donations. They utilize Master Challenge Cost Shares, Assistance Agreements, and a series of project specific agreements that facilitate funds transfers. They also hold several MOUs that lay out how working relationships are maintained and how advocacy is separated from stewardship.

**Budget:**

\$1.4 Million annually.

**Tracking:**

FNW tracks volunteer work through a mix of Nation Builder, Volgistics, and custom data bases depending on the tracking needs of the project. Due to their size and the breadth of their work multiple platforms need to be used.

**Discover Your Forest:****Profile:**

Discover Your Forest (DYF) is the official partner organization for the Deschutes and Ochoco National Forest. They also operate a visitor center for the Newberry Volcanic National Monument. They operate under a parent organization, Discover Your Northwest, in a Doing Business As arrangement that allow them to utilize Discover Your Northwest HR and funding resources. Discover Your Forest began in an RFP process that was initiated by the Deschutes National Forest under the direction of the Forest Supervisor. Discover Your Northwest was chosen, and Discover Your Forest was formed in this process. DYF manages visitor centers, stores, and education and interpretive facilities and programs across the Deschutes National Forest and act as the official tracking entity for volunteer data. They do not directly manage stewardship volunteer activity and work with other groups and volunteer organizations to collect and aggregate tracking information on behalf of the Forest. This includes collecting data that has been reported directly to the Forest by volunteers from the relevant forest staff for aggregation with other volunteer reported data kept by DYF for end of year reporting. Discover Your Forest is able to provide more direct service to the Forest by outsourcing HR, direct fundraising, and unrestricted operating funds collection and allocation to their parent organization Discover Your Northwest. This arrangement allows DYF to be more program focused and utilize the much larger infrastructure of Discover Your Northwest for operating tasks. They do, however, draft and sign their own project and funding agreements with the National Forests/Monument, operate retail in their region, and undertake their own fundraising activities. The Discover Your Northwest systems allow them to be more targeted with their activities.

**Staffing:**

Discover Your Forest has a relatively small staff for the breadth of their work:



- **Executive Director** responsible for in house human resources tasks (higher level HR needs are handled by Discover Your Northwest), development, fundraising, and agreement maintenance and structuring.
- **Education and Volunteer Program Director** oversees all education and interpretation programs which includes training volunteers and outreach to community partners.
- **Retail Coordinator** responsible for managing retail stores in all Discover Your Forest areas. Also responsible for financial and budget management.
- **Community Engagement Director** assists Education and Volunteer Program director recruit, train, and track volunteers and volunteer activities. Also performs outreach and event planning activities.
- **Education and Stewardship Coordinator** works to connect National Forest staff and programs along with Discover Your Forest programs with local and regional schools and designs and implements outdoor education activities.
- **Conservation Educator** assists Education and Stewardship Coordinator to design and implement education programs at different locations around Discover Your Forest's working area.
- **Additional Seasonal Staff** education and interpretation seasonal staff.

#### **Programmatic Focus:**

Discover Your Forests primary focus areas are:

- **Education** DYF conducts a large variety of education programs both in schools and on the Forest. DYF has engages thousands of students in central Oregon schools every year.
- **Interpretation** DYF host the vast majority of interpretive programs on the Deschutes National Forest, the Newberry Volcanic National Monument, and the Ochoco National Forest.
- **Retail** DYF operates visitor centers and the associated retail stores under the direction of Discover Your Northwest for the various public lands units they partner with.
- **Volunteer Coordination** DYF is responsible for volunteer coordination and tracking on the Deschutes and Ochoco National Forests. DYF conducts all volunteer tracking and data aggregation, including collecting data reported directly to the forest. DYF communicates with volunteer organizations and federal agencies and coordinates communication strategies.
  - DYF recently convened the Deschutes Trail Collaborative in order to address landscape level restoration and trail needs.

#### **Funding and Agreements:**

Discover Your Forest, while receiving some general operating funds from Discover Your Northwest, operates at a programmatic and project level with funding from National Forest Agreements, donations, retail, and fundraised funds. DYF has two Master Challenge Cost Shares, one covering work, and one covering a separate intern program operated in partnership with the Deschutes National Forest. Each master agreement is a five-year agreement to which supplemental agreements are attached with various levels of funding depending on the project or program. A lantern rental program operated at Newberry Volcanic National Monument provides over \$100,000 a year in retail revenue. Other revenue comes from donation and fundraising programs.



**Special note:** Following the RFP which led to the formation of DYF the Deschutes National Forest entered into agreement, Master Challenge Cost Share, using funding drawn from a number of different program areas on the forest. This funding supported initial programs and staff along with education programs.

**Budget:**

\$300,000+ Annual

**Tracking:**

Volunteer numbers, hours, and data area tracked using Volgistics. Trail and stewardship accomplishment are tracked via spreadsheet. When information is transferred to DYF it is done via spreadsheet or a project repost e-mail.

**San Juan Mountains Association:**

**Profile:**

The San Juan Mountain Association (SJMA) was created in 1988. They began by running the bookstore for the San Juan National Forest and programming expanded from there. They assist the San Juan National Forest by providing conservation education, cultural programs, visitor information, and volunteer services. They are also in partnership with the Bureau of Land Management Tres Rios Field Office to assist in educational programs and volunteer projects. They share offices with both public agencies in the San Juan Public Lands Center in Durango, Colorado. T

**Staffing:**

The SJMA employs 12 staff members including Executive Director, Cultural Program Director, Volunteer Program Director, and Director of Education and Outreach. Many staff members are also employed to assist with bookstore operations.

**Programmatic Focus:**

The San Juan Mountain Association focuses in the areas of conservation & science education, cultural education, and visitor information. In 2017, the SJMA recorded 12,000 hours of volunteer work from over 350 volunteers. The SJMA operates as the clearing house for all volunteer activity on the San Juan National Forest. They host biannual roundtable discussions featuring USFS, BLM, and volunteer organizations. Additionally, the SJMA also facilitates Adopt a Road and Alternative Spring Break programs.

**Funding and Agreements:**

The SJMA is funded through agreements, grants, corporate partnerships, and fundraising events. They have a nearly \$1.4 million in annual budget. They share office space with the USFS and BLM through the facilitation of lease agreements. There are many agreements in use between the USFS and the SJMA. Forest Service funds are matched to support the Volunteer Director position. The SJMA has run a very successful christmas tree selling event. In 2017, they had more than 100 volunteers who prepared and sold christmas trees for the event.

**Budget:**

\$1.4 million annually.

**Tracking:**

The SJMA tracks metrics through Volgistics. Other volunteer organizations track their own metrics but send data to the SJMA who compiles the majority of volunteer and tracking data for the Forest Service.



## **Mt. St. Helens Institute:**

### **Profile:**

The Mt. St. Helens Institute (the Institute) began in 1992. They recruit, train and facilitate volunteers working on the Mt. St. Helens National Monument. They host outdoor youth education programs at the Science Learning Center, guided exploration programs, and train volunteers to assist visitors of the Monument as Recreation and Mountain Stewards. The Institute's primary focus is to enrich visitor's appreciation and understanding of the Mt. St. Helens volcano.

### **Staffing:**

The Institute employs 6 year round staff including Executive Director, Science Education Director, and Volunteer Programs Director. The Institute also employs 13 seasonal staff members that provide science education, natural resource & fisheries, and guided programs assistance.

### **Programmatic Focus:**

The primary focus of the Mt. St. Helens Institute is in the areas of conservation & science education. In 2016, the Institute engaged with more than 4,000 children and youth through exploration and science programs. Exploration programs engaged more than 500 people in trails and interpretative services. The Institute also dedicates efforts to science programming by surveying and monitoring natural resources on the Monument. The volunteer program contributes to the organization's stewardship, interpretation and youth education goals. They recorded over 15,000 hours of volunteer hours in 2016.

### **Funding and Agreements:**

The Institute is funded through agreements, grants, corporate partnerships, earned income, and fundraising events. They have a nearly \$800,000 annual budget that supports their work. They share office space with the USFS through the facilitation of lease agreements. There are many agreements in use between the USFS and the Institute. Forest Service funds are matched to support the Volunteer Coordinator position. Grant funding comes from foundations primarily along with a handful of smaller grant making organizations. A large portion of the Institute's funding comes from earned income by operation of the Science Learning Center and sells permits and merchandise.

### **Budget:**

\$800,000 annually.

### **Tracking:**

The Institute tracks metrics through Volgistics. Other volunteer organizations track their own metrics but send data to the Institute who compiles all volunteer and tracking data for the Forest Service.

## **Friends of Fish Lake:**

### **Profile:**

The Friends of Fish Lake (FoF) began in 2010. Fish Lake is a historic site on the Willamette National Forest which FoF works to provide heritage, maintenance, and interpretive services for the site.





**Staffing:**

The FoF does not employ any staff. Many of the board members and members of the organization perform the day to day duties of the organization.

**Programmatic Focus:**

The primary program areas or in the areas of heritage and cultural maintenance work for the Fish Lake recreation area. They are in the planning stages of implementing interpretive and educational programming.

**Funding and Agreements:**

The FoF currently have one Memorandum of Understanding between the organization and the Forest Service. Funding comes through grants and membership dues. They have about 90 dues paying members.

**Budget:**

Varies between \$10,000 and \$20,000

**Tracking:**

The FoF tracks volunteer data through paper records.

**Northwoods Volunteer Connection:**

**Profile:**

Focusing on the Superior National Forest and Boundary Waters Canoe Area Wilderness, the Northwoods Volunteer Connection coordinates volunteers to complete work on public lands that keeps forests healthy and trails and campsites open for use. They take care of the logistics and provide the tools and equipment needed to complete the job. NVC has had non-profit status since June 2016 with a board. Previously, they were run by a steering committee. The board is comprised of members of three user groups (ATV, motorcycle, and ski).

**Staffing/structure:**

- **Executive Director** works part time, applying for grants and coordinating activities.
- **Intern** works seasonally in summer
- **Board** has chair and secretary. Need someone to come on who can be treasurer. Meet every other month. Pretty wide spread geographically so have a conference call line that is open too.

**Funding/Resources:**

- Most grants are for one year.
- Forest Service committed funds for the next three years for wilderness specifically.
- Local organization gave large donation to get NVC started.
- They have a challenge cost share agreement, and a special agreement under that. That is probably how she has office space. Was set up before she was hired, worked out by the chair and Forest Service.

**Communication with Forest:**

- Have a liaison at Forest who attends all board meetings and facilitates agreements with the Forest Service. Have a liaison in a different district as well, but it is 5 hours away and so there is less contact.



- Meet with all recreation and wilderness staff annually. Met with forest supervisor and other key staff last year. Meet quarterly with County Parks and Trail and District Recreation staff.

**Programmatic:**

- Trying to develop natural resources branch, tree planting and invasive species work and opportunities for more.
- Works primarily with short term volunteers. ED typically leads projects unless there is a strong volunteer leader.
- They have a volunteer service agreement, a master one, and group one gets signed every time and they also sign a waiver.
- Sometimes will partner with existing, strong volunteer groups to give funds and resources, but does not manage in any way, as those groups have their own agreements with the Forest.
- Social media is the best way to advertise volunteer opportunities, as well as trade shows and expos.

**Tracking:**

- Keep track of all volunteer hours, but Forest Service collects information from volunteer groups directly.

**Philosophy:** Grow a little a bit each year. Don't start out trying to be something they simply don't have capacity to do. Great that now that they have an intern, and hope to hire a seasonal staff member in the future.

## **Selway Bitterroot Frank Church Foundation:**

**Profile:**

The Selway Bitterroot Frank Church Foundation is based in Missoula, MT and Boise, ID and services the Selway Bitterroot and Frank Church River of No Return Wilderness complex in those two states. They have an express focus on the ground Wilderness stewardship. They were formed in response to concerned citizens expressing the need for greater stewardship of Wilderness trails and resources within the complex and the forests recognition that they needed more capacity to meet the need. They grew from a small and lean organization to a larger more nimble organization that has become one of the primary stewardship and volunteer organizing force for work within the Selway Bitterroot and Frank Church.

**Staffing:**

SBFC has 3 primary year round staff members and 16 seasonal composed of 8 crew members and 8 ranger interns. The permanent staff is composed of the Executive Director, Programs Director, and Communications manager. These 3 primary staff share general day to day operating duties and are split between the two offices in Missoula and Boise. The seasonal are split as well and base out of where ever it makes sense for the given projects they are engaged in.

**Board:**

SBFC has a 16 member governance board that is primarily responsible for development related tasks.



**Programmatic Focus:**

SBFC is almost 100% stewardship focused and other activities, outreach events, and public gathering events are designed to support stewardship functions. They have multiple stewardship program focuses.

- **Intern Crews and intern rangers.** These individuals are paid and supported by BMWF but are embedded directly with the Forest Service and receive job training and skills training.
- **Wilderness Crews** paid crew staff that works to maintain and monitor trails and Wilderness Character in the wilderness complex

**Funding and Agreements:**

SBFC operates through a series of Master Challenge Costs Shares that are carried at the Forest and Regional level. They facilitate shared work space, tools and project related expenses, and some staffing and admin costs. Approx. 60% of their funding is gained through agreement and 40% through grants and fundraising efforts.

**Budget:**

Unknown

**Tracking:**

SBFC mirrors USDA Forest Service INFRA tracking and uses Excel. Other items are tracked at the request of particular funders per grant requests. Volunteer/Donor data is tracked via a CRM type program.

**Southern Appalachian Wilderness Stewards:**

**Profile:**

Southern Appalachian Wilderness Stewards (SAWS) grew from a Wilderness Society supported effort to designate new Wilderness in Tennessee and North Carolina. Stewardship soon became a primary focus and initial stewardship efforts were supported by the Wilderness Society. SAWS later became an independent 501c3 nonprofit after the Wilderness Society changed focus and stances on stewardship issues. SAWS stewardship activities grew from a trails collaborative composed of over 50 groups. SAWS still actively works for new targeted designations but has a much larger, 90+% focus on stewardship actions. Most of their activities are carried out by paid professional staff, or intern and Corps crews. SAWS is a member of the 21 CSC program as well as a Resource Assistant pilot site.

**Staffing:**

8 primary staff. 3 program managers, Lead Wilderness Ranger, Finance and Admin staff, Development Staff, Executive Director. SAWS employs 30 seasonals as rangers and crew members.

**Board:**

15 member governance and development board focused on fundraising and support functions.

**Programmatic Focus:**

SAWS focuses on professional, intern, and Corps crew activities. They have minimal individual



volunteers. When they do have volunteers they are most often organized groups such as alternative spring break groups or school/university groups. Their crews work on multiple forests primarily in designated Wilderness areas. Their programs are focused on helping build capacity in a younger population. They have a Coprs crew program, a 21 CSC member, that draws participants from urban and underserved populations. They also have a relationship with the Naval Academy and run programs with them. Their other primary activity is training. In partnership with Region 8 of the Forest Service they run an annual Wilderness Skills Institute that focuses on training partners and agency employees in Wilderness skills and traditional skills/tool use. Their Resource Assistant, Ranger Intern Program, and 21 CSC help younger people gain skills and get agency jobs through selective hiring authorities.

**Funding and Agreements:**

SAWS operates through a Master Challenge Cost Share at the regional level that is also honored on individual forests. They have an MOU that is currently expired but are working to renew. Agreements include significant buy in from the agency and SAWS partnership is written into staff work plans. Approx. 60% of their funding is gained through agreement. The remainder is gained through grants and fundraising.

**Budget:**

\$850,000

**Tracking:**

Project tracking mirrors INFRA as much as possible and is tracked via spreadsheet by wilderness area and project. Other tracking done with a CRM

**Pacific Crest Trail Association:**

PCTA was interviewed, and we reviewed their training and project documentation and protocols in order to look for best practices and to understand how they operate across the varied landscapes of the trail. The PCT crosses many different jurisdictions and involves many partnerships. We opted to not construct a full case study in order to focus on specific strategies.

- Standardized training across the network. PCTA partners with local and regional stewardship groups to host a series of Trail Skills Colleges that teach important trail maintenance and volunteer management skills needed for work along the PCT.
- Regional Representation: The PCTA maintains regional representation to ensure that work and activities in those regions meets the needs of not only the PCTA and the associated federal and state agencies but also the local needs of that particular trail area.
- Tracking and agreements. The PCTA is a federal and nonprofit partnership and is part of the National Scenic Trails Network. They receive federal funding but also work as a nonprofit to fundraise and support regional and local groups through agreements. They help facilitate agreements and partner work through their administrative systems.



## **Poudre Wilderness Volunteers:**

Poudre Wilderness Volunteers works in the Front Range of Colorado and is an all-volunteer run organization that works to support the Canyon Lakes Ranger District in Colorado. They have volunteer ranger programs, invasive weed removal crews, and trail stewardship crews. They have extensive support from the Forest Service. We spoke to them to understand their volunteer ranger programs and how they track their work.

- Developed their volunteer ranger program out of identified need and lack of federal employee presence. Training is done in close coordination with the Forest Service and a robust training manual and program was developed. PWV holds a week-long training for all volunteers every year and new volunteers are required to go through a lengthy process in order to qualify for regular volunteer patrols. It is a sort of apprentice program. Once volunteers are “certified” they have an assigned number of patrols they must take each year.
- Their stewardship programs work in a similar way.
- They track their work through an online portal that allows for self-entry of data in a standardized form. Data is tracked in a location and project specific way. This data base was developed in partnership with the Forest Service and local software developers.
  - As of July 2018 we are working to gain access to this program and will author an update report as able.

## **Greater Oakridge Area Trail Stewards:**

Greater Oakridge Area Trail Stewards (GOATS) was interviewed for specific information regarding their interaction with the High Cascades Forest Volunteers and the Willamette National Forest. Specifically what are the challenges they face with reporting and partnering with HCFV and the Forest. The primary challenge mentioned was communication and a break down of systems. GOATS does all their project tracking through HCFV and would like to continue. They are generally supportive of a new external organization to handle volunteer coordination, communication, tracking, and recognition.

Structurally GOATS is an all-volunteer organization that serves multiple trail communities. They are a multi-use group that serves mountain bike, hiking, motorized, and some equestrian trails. They operate under a master volunteer agreement and they supply their own tools. GOATS is very community oriented in the Westfir/Oakridge area.

## **Truckee Trails Foundation**

Truckee Trails Foundation is a community nonprofit that is focused on the development and maintenance of non-motorized trail systems in and around the community of Truckee California. They grew out of a community trails and transportation master plan that named the formation of a nonprofit focused on non-motorized and multi-modal trail infrastructure as a



priority. They partner with the town of Truckee, the U.S.D.A. Forest Service and a number of other local partners. We reviewed their outreach materials, website, and project related documents. We determined that at this time Truckee Trails Foundation and their activities were less relevant to our process but we may want to contact them later to profile specific aspects of their trails program as our process on the Willamette evolves.



**Section 2d: Table 2: Forest Service Unit Attributes.**

<i>National Forest</i>	<i>Background</i>	<i>Volunteer Program Management</i>	<i>Partnering Agreements</i>	<i>Partner Organizations</i>
Deschutes National Forest - OR	1.8M acres along east side of Cascade Range in central Oregon, HQ in Bend, OR. 3 Ranger Districts. Last year 33,000 volunteer hours devoted to trails.	Discover Your Forest manages and tracks education and interpretive programs. High Cascades Forest Volunteers tracks trail maintenance hours. FS meets bi-monthly with trail groups.	Discover Your Forest has 2 master challenge cost share agreements with the FS. FS has individual agreements with other trail groups. No agreement in place with High Cascades.	Discover Your Forest, High Cascades Forest Volunteers, Greater Oakridge Area Trail Stewards, Pacific Crest Trails Association, Disciples of Dirt.
Okanogan-Wenatchee National Forest - WA	4.69M acres (4x the size of the Willamette). Stretches from Canadian border to Goat Rocks Wilderness, 7 Ranger Districts, size of forest creates challenges.	No central organization for volunteer coordination. Methow Trail Collaborative acting as an umbrella organization for Methow Valley Ranger District groups.	Various agreement structures are utilized. There is no forest-wide, standard agreement model for partnerships.	Northwest Youth Corps, Washington Conservation Corps, Backcountry Horsemen, Evergreen Mountain Bike Alliance, Methow Trail Collaborative.
Mt. St. Helens National Monument – Gifford Pinchot National Forest - WA	100,000 acres, operates similar to a Ranger District of Gifford Pinchot NF. 931 volunteers last year. Almost half of all volunteer hours are spent ‘assisting visitors’.	Volunteer hours are tracked by groups but compiled by FS Community Engagement Coordinator. Mt. St. Helens Institute is largest partner organization.	Mt. St. Helens Institute is co-located with Monument staff. FS has 7 or 8 agreements in place with Institute.	Mt. St. Helens Institute, Backcountry Horsemen, Washington Trails Association, Northwest Trail Alliance, Boy scouts.
San Juan National Forest - CO	1.8M acres, southwestern Colorado, Shared HQ with BLM in Durango, CO, 3 Ranger Districts, Covers southern San Juan Mountains west of the Continental Divide	San Juan Mountain Association is a clearing house for volunteer activity on the Forest. Hosts a variety of programs including Trail maintenance, surveys, monitoring, wildlife ecology, and education and interpretation	San Juan Mountain Association is co-located with the San Juan FS through lease agreement. Master challenge cost-share agreement to match 50k\$ for salary of Volunteer Coordinator position.	San Juan Mountains Association acts as a clearing house for all volunteer activities for all public land managers in the area.



## USDA Forest Service Profiles:

### Deschutes National Forest – Central Oregon (Spoke with Marvin Lang and Joe Welke)

Background – Located in Central Oregon the Deschutes spans 1.8 M acres along the east side of the Cascade Range. The majority of volunteer programming operates out of the Bend Ranger District Office. There are 3 total Ranger Districts. The Deschutes shares a border with the Willamette National Forest, which creates opportunities for collaboration and sharing of resources. Last year 33,000 hours of volunteer work were recorded on trails alone.

Volunteer Program Management – Volunteer programming in the Deschutes is divided up between trails/wilderness and educational/interpretive activities. Deschutes National Forest volunteer trail work is managed mostly by Joe Welke, Volunteer Coordinator, and Marvin Lang, Recreation Forester. Volunteers perform 80% of basic trail maintenance work for the Forest.

**The High Cascades Forest Volunteers** tracks volunteer hours and conducts saw recertifications. The Deschutes holds bi-monthly meetings with active trail maintenance groups to discuss projects and meets annually with groups to update operating agreements.

**Discover Your Forest**, a 501(c)3 nonprofit organization located in Bend, OR, manages most of the educational and interpretive volunteer activities for the Deschutes National Forest. The organization uses Volgistics to track volunteer hours but the program isn't well suited for tracking trail work.

Partnering Agreements – There is no central organization that organizes all volunteer activities. The Deschutes has two master challenge cost share agreements in place with Discover Your Forest. The Forest also partners closely with the High Cascades Forest Volunteers but does not have an official agreement in place with the group. The Deschutes has individual agreements with various volunteer organizations.

Although the Deschutes does not have any formal agreements in place with the High Cascades Forest Volunteers, the group recently expressed intentions to incorporate into a 501(c)3 nonprofit. A meeting was held in March to discuss opportunities for volunteer management coordination between the Deschutes and the Willamette National Forests. Included in discussion was how both might interact to utilize and support a formalized HCFV partner organization who would act as a central trail maintenance volunteer hub.

Partnering Organizations – Volunteer organizations and groups that work on the Deschutes include the Greater Oakridge Area Trail Stewards, the Disciples of Dirt, the Pacific Crest Trails Association, Discover Your Forest, and the High Cascades Forest Volunteers.





## Okanogan-Wenatchee National Forest – Central Washington

Background – The Okanogan-Wenatchee National Forest is massive and spreads out over 4.5 million acres from the Washington-Canadian border to the Yakima Wilderness. It is 4 times the size of the Willamette NF and contains 7 districts. The districts operate largely independent from each other when it comes to volunteers. Recent efforts have been made to consolidate volunteer management, but the immense size of the Forest presents challenges. The community that surrounds the Forest is varied from very rural communities, to seasonal multi-home families, and the growing Latino community around Yakima. The volunteer force handles 90% of trail maintenance duties on the Forest and 60% of work is handled by 4 – 5 main nonprofit organizations.

Volunteer Program Management – There is no single dedicated staff member that is responsible for all volunteer activities however Susan Thomas, Partnership Coordinator, does the majority of interfacing with the volunteer group leadership. The Forest is currently looking for funding to hire a volunteer coordinator but is not likely to happen. The Forest meets annually with the larger volunteer groups, such as the Pacific Crest Trails Association, the Washington Trails Association, the Evergreen Mountain Bike Alliance, and the Methow Trail Collaborative to discuss projects and yearly strategic planning regarding actions on the forest. The volunteer organizations are encouraged to identify and propose projects of their own, the Forest will redirect them as appropriate.

Partnering Agreements – Given the size of the Forest, a centrally organized group has not yet formed to facilitate volunteer activities. Hours are tracked ad hoc separately by Forest and volunteer organizations. The Forest has individual operating agreements with the different groups such as a five-year master challenge cost share with the Mountain to Sound Greenway Trust.

An interesting organization on the Forest is the **Methow Trail Collaborative**. The Collaborative is not a registered 501(c)3 but it did receive funding from the Forest Service Regional Office at start up. Acting as an umbrella organization to many individual volunteer groups in the Methow Valley Ranger District, the Collaborative's structure may be of interest to the Willamette NF. The CSC Forest Service Team will be working to make contact with the Collaborative to find out more about their volunteer management structure.

Partnering Organizations – Volunteer groups that operate on the Forest include the Pacific Crest Trails Association, the Washington Trails Association, Northwest Youth Corps, Washington Conservation Corps, Backcountry Horsemen, Evergreen Mountain Bike Alliance, the Methow Trail Collaborative, and the Mountain to Sound Greenway Trust.



## **Mt. St. Helens National Monument – Gifford Pinchot National Forest – Southwest Washington**

Background – The Mt. St. Helens National Monument makes up a small portion of the Gifford Pinchot National Forest. The Monument operates similar to an individual Ranger District within the Gifford Pinchot NF. Despite its small size the Monument uses many volunteers; there were

931 individuals performing volunteer work on Monument last year. The Monument receives many visitors every year and most of the volunteer efforts are directed towards visitor experience. The Monument has received very positive ratings with the general public because of the large amount of volunteer hours spent interfacing with visitors.

Volunteer Programming Structure – By far the most significant volunteer organization partnering with the monument is the **Mt. St. Helens Institute**. The Institute tracks and trains volunteers that lead trail hikes and mountain climbing tours for Monument visitors. In fact, nearly half of all volunteer hours were logged as ‘assisting visitors’ last year. The Institute

handled almost all volunteer management duties in the past but recently the Forest Service has taken those duties on. Amy Wilson, Community Engagement Coordinator, is now the main point of contact for all volunteers on the Monument. Volunteer hours are still tracked through the partners but are compiled and reported in Volgistics by Amy.

Trail maintenance makes up a significant portion of total volunteer hours (over one-third) but much less so than other National Forests the CSC Forest Service team has researched. Trail work is also managed by the Institute but is mainly supported by the Washington Trails Association. It is unclear whether Volgistics is utilized for trail maintenance reporting by the Monument.

Partnering Agreements –The Monument and the Institute have over 6 different operating agreements in place, some are set up to enable the FS to move funds to the Institute. The Institute is also **co-located** with the Monument, meaning that they share a physical office space. They meet often to anticipate volunteer management and staffing needs of the Monument.

Partnering Organizations – Volunteer groups that operate at the Mt. St. Helens National Monument include the Mt. St. Helens Institute, Backcountry Horsemen, the Washington Trails Association, the Northwest Trail Alliance, the Mount St. Helens Snowmobile Trac Riders, and The Boy Scouts.

## **San Juan National Forest – Southwestern Colorado**

Background – The San Juan National Forest comprises most of the southern area of the San Juan Mountains and shares borders with two other Nation Forests. The 1.8 million acres of Forest are divided among three Ranger Districts. The Supervisor’s office is located in Durango,



CO at the San Juan Public Lands Center. In addition to the the US Forest Service the Center also houses the BLM and the **San Juan Mountain Association**, the principal volunteer partner of the San Juan.

Volunteer Programming Structure – Volunteer programming on the San Juan National Forest covers a wide range of activities from conservation education to water quality monitoring. The San Juan Mountain Association acts as a clearing house for volunteer activity on the forest. In 2017, the SJMA facilitated over 12,000 hours of volunteer work. Kathe Hayes, Volunteer Program Director, is the main point of contact for all volunteers on the Forest. Kathe tracks all metrics and delivers them to the FS for reporting. The SJMA takes the lead in communications and decision-making with the Forest. The organization hosts a roundtable discussion with the FS and other volunteer groups in the region. The meetings serve to coordinate project and training priorities for the agency and volunteer groups as well as act as a trust building tool between the Forest Service and the public. The meetings are facilitated by a third-party contractor so that all parties are able to participate in discussions.

Partnering Agreements – The SJMA originally began running the bookstore for the San Juan in 1988 and programming has developed from there. The co-location arrangement is worked out through lease agreements. A Master Challenge Cost Share agreement is in place that essentially pays for the SJMA’s Volunteer Director position. Kathe Hayes is instrumental in developing the valuable partnership between public lands agency and nonprofit organization. Former FS colleagues say that ‘she does the work of a GS 12 for half the price from the Forest Service’s perspective’. She says the key to developing these partnerships is to build trust and to find someone who will be the main contact and source of support in relationship-building

Partnering Organizations – Acting as a clearing house for all volunteering activities on the San Juan National Forest, the San Juan Mountain Association is the Forest’s primary partner

### **Siuslaw National Forest- Oregon**

Background – Interviewed Kraig Lindelin, Trails Coordinator for the Central Coast District. Kraig primarily works alone to coordinate volunteers, although he does have some staffing help in summer. A few of the successful aspects in his region include:

- Interns working in interpretation
- Recruiting volunteers with signs at trailheads
- Distributing special volunteer t-shirts which both promote team spirit as well as serve as a marketing tool



## SECTION 3:

### Equity and Diversity Resources:

**Selected readings, activities, media and tips & tools for approaching and achieving diversity, equity, and inclusion**

#### Readings

Gould, Rachelle K., et al. "Seizing Opportunities to Diversify Conservation." Conservation Letters, 2018, doi:10.1111/conl.12431.

Diversity and the Conservation Movement:

[https://naaee.org/sites/default/files/eepr/resource/files/diversity\\_module.9.22.15.pdf](https://naaee.org/sites/default/files/eepr/resource/files/diversity_module.9.22.15.pdf)

Presidential Memorandum -- Promoting Diversity and Inclusion in Our National Parks, National Forests, and Other Public Lands and Waters: <https://obamawhitehouse.archives.gov/the-press-office/2017/01/12/presidential-memorandum-promoting-diversity-and-inclusion-our-national>

#### Tools

Bias Interrupter Toolkits for Organizations and Individuals: <http://biasinterrupters.org/#tools>

Cultural Mapping Toolkit: [https://theavarnagroup.com/wp-content/uploads/2018/01/cultural\\_mapping\\_toolkit.pdf](https://theavarnagroup.com/wp-content/uploads/2018/01/cultural_mapping_toolkit.pdf)

Tips on Engaging Latino Communities: [https://theavarnagroup.com/wp-content/uploads/2018/01/Genial\\_Latino\\_Audiences.pdf](https://theavarnagroup.com/wp-content/uploads/2018/01/Genial_Latino_Audiences.pdf)

Toolkit for Implementing the Presidential Memorandum: <https://theavarnagroup.com/wp-content/uploads/2017/01/POTUS-Memorandum-Toolkit.pdf>

#### Media

An Untapped Natural Resource: Our National Public Lands and the "New America"

[https://theavarnagroup.com/wp-content/uploads/2016/12/pub\\_land\\_div\\_poll.pdf](https://theavarnagroup.com/wp-content/uploads/2016/12/pub_land_div_poll.pdf)

Region 6 Equity, Diversity and Inclusion in Volunteerism priorities  
Targeted Interview with:



Brenna White, Conservation Education Partnership Specialist  
Emily Biesecker, Volunteers & Service Program Manager  
Region 6, USDA Forest Service

**Interview key points:**

- Shared Stewardship priority
- Need to develop more comprehensive way to capture the accomplishments achieved by volunteers.
- 2016 National Forest Stewardship Act has been a catalyst for this effort
- Forests don't have the capacity to work with volunteers, so they work with partner organizations to help
- National mandate that all FS programs are open and available for all people, this includes volunteerism.
- Want to increase efforts of incentivizing volunteerism, can do this through higher education programs
  - Educational partnerships are a good way to engage underserved populations, but it needs to be coupled with a stipend and job trainings programs.
- No specific regional level volunteer related funding.
- At national level there is money earmarked for education and youth engagement
- Youth Engagement Strategy
- Region 6 has an engaging youth request program to apply for funding by individual forests