Ecosystem Workforce Training Project
Start-up and Operations Manual

Prepared by the Rogue Institute for Ecology & Economy

Rogue Institute
for Ecology and Economy

Sustainable Forests, Sustainable Jobs and Sustainable Communities.
Ecosystem Workforce Training Project
Start-up and Operations Manual

This Start-up and Operations Manual was developed as partial fulfillment of a federally funded grant entitled “Ecosystem Workforce Training: Building Local Capacity for On-going Delivery of Jobs-in-the-Woods Training for Southwestern Oregon” (ORNW-95-008).

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Rogue Community College

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# Ecosystem Workforce Training

Project Implementation Handbook

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ACKNOWLEDGMENTS

This manual would not be complete without acknowledging the hard work, commitment, and sacrifice by a number of individuals. First, there is the core group of people who first had a vision of, and commitment to, forming a training demo site in the Rogue Valley - Tom Dew, community development coordinator for the Rogue River National Forest (RRNF); Mollie Owens-Stevenson, economic development and women's program coordinator for Rogue Community College (RCC); Ray Olsen, manager of The Job Council (TJC); and Brett KenCairn, executive director of Rogue Institute for Ecology and Economy (RIEE). Through their efforts a number of other partners were recruited into the effort - Southern Oregon Women's Access to Credit (SOWAC), Southern Oregon Regional Economic Development, Inc. (SO-REDI), Bureau of Land Management-Medford (BLM), Siskiyou National Forest (SNF) - and a steering committee made up of representatives of these organizations and others was formed to guide the overall operation of the Ecosystem Workforce Training Partnership (EWTP).

This steering committee made the demo work. They were a group of people from diverse backgrounds and organizations and they proved that a large group with a single purpose can pull together to accomplish a formidable task! Those hard-working individuals, in addition to the core group, are Charles Spencer - Labor Education and Research Center (LERC), University of Oregon; Gordon Safley - SO-REDI; Dan Ingledue, Debbie Whitall, Richard Boekel, Dave Green - RRNF; Jill Wilson, Kathy McKee, Randy Costello - TJC; Mary O'Kief, Robin Brooke - SOWAC; Bob Walker, Aaron Horton, Jim Roper - BLM; Dave Vezie, Steve Tanner, Dan Magallanez - SNF; Bob Warren - Oregon Economic Development Department (OEED); Marc Prevost - Rogue Valley Council of Governments (RV-COG); Marty Main - Small Woodlands Services, Inc.; David Fuller, Rob Fuller - RCC; Luis Olivas, Juan Villaseca - Convenio; Alan Campbell - Oregon State University Extension Service; and Chuck Miller - Oregon Department of Forestry (ODF).

The last group of people I want to acknowledge is the people we are here for - the trainees in the EWTP. I especially want to acknowledge the people that participated in the 1995 training program. They put up with a lot in the fledgling first year - poor supervision, lack of clear guidelines, short supply of tools, equipment, and vehicles - but they are the people that really showed us where we needed to improve and supplied the experiences that are the backbone of this manual. The ten people that successfully completed the 1995 program are: Leonard (Mitch) Lee, Karen and Rick Davis, Danny Daniels, Bryce (Joe) Clowery, Jeronimo Gonzalez, Victor Vargas, Horacio Romo, Robert Crawford, and Gino Stefani. I hope this experience was an important addition to your personal and work life.

Finally, my hat is off to this year's trainees. They are the proving ground for what is in this manual. They are teaching us that there never will be a final operation manual - that the training program is a constantly changing and improving operation. The thirteen people enrolled in the 1996 EWTP are: Dean Bohn, Jacob (Jake) Crabtree, Jesus Deras, Eden Gerrick, Darcy Gobel, Moises Gomez, Hilario Ibarra, Leopoldo Ibarra, Terry Ledin, Derek Patterson, Doug Prowell, Gary Smith, and Zacimo Salas. Keep up the good work and glean all you can from this year's program.

Thanks to everyone. You all have contributed so much.

Glen Brady, EWTP Project Coordinator
Rogue Institute for Ecology and Economy
INTRODUCTION

It should be pointed out from the beginning that many of the activities described in this manual will be carried out simultaneously. It doesn’t often happen that one activity is completed before another is begun. Throughout this manual you will see references to Jobs-in-the-Woods (JITW) and Ecosystem Workforce Training Partnership (EWTP). They are one and the same program - EWTP is a more recent title for the training program.

The Editor

OVERVIEW

THE PURPOSES

The successes of the Jobs-in-the-Woods (JITW) program in the last two years have generated a growing enthusiasm for the concept of a healthy, prosperous, and stable relationship between the woods, the workforce, and their communities. This year’s program will further these relationships, with emphasis upon the following selected areas seen as central by the Review Forum sponsored by USDI- Bureau of Land Management, USDA-Forest Service, Oregon State University, University of Oregon, and Oregon Economic Development Department in November, 1995:

• Implementation of the JITW Forest Management philosophy, i.e.: a broad scope of management practices and restoration work over an extended period of time;

• Support for the agencies in making the “work culture” and management philosophy shift; assistance and facilitation of the change process;

• Working through example to change the contracting process from short term/low bid to longer term/negotiated contracts to provide stability to small rural communities;

• Increase clarity of JITW expectations for workforce applicants, giving priority to displaced workers who are enthusiastic about training, who have good communication skills, and who have experience working in the woods on a team;

• Maximize learning using high-quality core curriculum; integrate field education to make training relevant and exciting to participants;

• Seek local, knowledgeable supervisors with wide forest experiences as instructors; continue the successes of partnerships among diverse individuals and organizations; involve private sectors;

• Target training toward a specific “end product”, a clearly defined set of skill areas held by workers with an intentional career development path; integrate the identification and selection of these options early into the curriculum.
THE PRODUCT

Our product is essentially a qualified worker. It is implicit from the purposes above that there be a “qualified” workplace using the JITW underlying philosophy about land management, multi-task, longer-term. The demonstration projects training is based on this vision of the forestry worker of the future. Using the prepared curriculum headed by Rogue Community College (RCC) for 1996, participants will obtain an Ecosystem Management Trainee Certificate of Completion following completion of the one-year program. Following graduation, participants will then self-select for:

- Completion of the two-year college program for Forest Technician, fulfilling the remainder of classroom/field education required by Rogue Community College programs;

- Participation in an Apprenticeship Program administered by the State of Oregon Apprenticeship & Training Council for the occupation of Ecosystem Management Joint Apprenticeship and Training Committee (JATC), DOT #452.364-010. Specific class hours obtained in the JITW Training program are credited towards requirements of the State of Oregon.

- Journeyman status for especially qualified trainee candidates recommended by program supervisor.

- Private enterprise, either as an entrepreneur, or as an employee.

TRAINEE GRADUATE

Apprentice-Management Specialist
College-Forest Technician
Journeyman
Private Enterprise

Employee
Business Owner

REFERENCES

Appendix A - Summary Report “Quality Jobs for Quality Ecosystem Outcomes” JITW Nov. 19
"Early Lessons from the 1995 Ecosystem Workforce Demo Projects" LERC Nov. 19
AGENCY DIRECTION

Federal, State and Local agencies are all going through a significant time of change. Budget cuts, downsizing, reduced timber harvest, polarized publics, stagnated work programs - the list goes on and on. The President’s Forest Plan has focused energy toward helping the people and communities affected by these changes. The Jobs-in-the-Woods program, that has given former timber workers, who once harvested and removed timber from the forest, an opportunity to continue working in the woods restoring health to the local ecosystem, is a good example. While the intent is to provide long-term, family wage work to the local communities, there have been internal federal contract regulations that have tended to work at odds with this intent. The Forest Service and Bureau of Land Management in Oregon, Washington, and California have made significant strides toward ensuring that dislocated workers will have an opportunity to learn new management techniques for the work of the future and that they will have access to contracts doing that work.

Appendix B contains multiagency letters of direction pertaining to these changes in contracting. These letters are dated May 20, 1996, May 3, 1996, and March 28, 1995, respectively. Please remember that these letters are for your information as to what the agencies are able to do. It is important that they not be used as a club to try to force your local Contracting Officer to do things your way, but rather as a common information base from which to develop a working relationship with that person and assist them carrying out their direction.
ECOSYSTEM WORKFORCE PROJECT STRATEGY

When you are about to embark on an important task such as starting up a new Ecosystem Workforce Training Project demo site or you are in a critical year for the continuation of an existing site, it is important to sit back, evaluate where you are, where you want to be, and how you are going to get there. Some call that a work plan, others the steps for success, and still others a strategy. We have chosen the term strategy. It is important in any task to look to someone who has been there and evaluated what they have done, whether it was good or not, and how it is can be improved if it wasn't good. The old saying “don’t re-invent the wheel” applies very appropriately when starting up a new demo site because re-inventing the wheel is very costly and ends up with a less than desirable end product. There are plenty of sites that have had both good and bad experiences - pick their brains. All are more than willing to share their experiences so the project can continue to be successful.

Appendix C contains a number of strategies that can be used at your demo site as examples. These are real life strategies - use them or develop new ones based on your own situation.

The first, entitled “Ecosystem Workforce Project - Workplan for 1996” contains a vision statement - “To demonstrate the linkages between a quality workforce, healthy communities and efficient and effective management for healthy forest ecosystems in the long term.” - then presents an action plan for accomplishing that vision.

The next strategy, entitled “Ecosystem Workforce Training - The Three Steps for Success” was prepared for the Employer of Record Project Coordinator at the Rogue Valley demo site. It was developed as a result of increased work responsibilities for the Coordinator and potential loss of interest in the demo site by key landowners that provide work projects. The Coordinator uses this paper almost daily to keep in touch with where he is headed and to measure progress.

The last strategy, entitled “JTPA Strategy Guide - Ecosystem Workforce Project” was prepared by the staff of the Ecosystem Workforce Project at the University of Oregon Labor Education Research Center (LERC) as a resource for new JTPA partners. The information put forth is a result of feedback from the JTPA partners at the existing demo sites and represents successful strategies used in the previous years as well as new strategies to be tested. This document covers recruitment, training coordination, and job placement.
IN THE BEGINNING - FORMING THE EWTP DEMO SITE

Anyone that tells you forming an Ecosystem Workforce Training demo site is easy has not been there! But don't despair - folks that have come before you are going to share their experience on how to do it. It still won't be super easy, but you won't have to repeat all the mistakes of the past. There are three main ingredients to the formation of a demo site - the Core Group, the Steering Committee, and the Agreements that make it all happen. Each of those will be explained and/or demonstrated in the following pages.

THE CORE GROUP

As the title implies, this is the group of people at the center of everything, the hub of the project, the energy that gets it going and keeps it going. It could be two people, it could be six people. The more in the core, the more likely the demo will succeed because it takes a lot of energy and perseverance to start up. These are people from different backgrounds and, often, different organizations that share a common vision and have probably worked together on other projects. They have high professional regard for one another and work hard together, sharing the workload equally. They see a need and look for a solution.

In Rogue Valley's case the core group was a Forest Service community development coordinator, a training resources coordinator for the local community college, a local JTPA provider, and the executive director of a local community-based non-profit. In your area it could be another group of individuals. No matter; the important factor is that you need this core with a vision and the drive to make it happen.

Rogue Valley's core saw that the agency dollars in the Jobs-in-the-Woods program were not benefitting the right group of people in our area, and that the dislocated timber workers, who often wanted to continue working in the woods, were instead being retrained into non-woods, less than family wage work. They heard about a workshop for local rural community supporters that was about an innovative new training program for dislocated timber workers that would teach them skills in new forestry management techniques and provide family wages. This was the Ecosystem Workforce Project workshop, held in November, 1994, for prospective demo site organizers. They talked about it on the long ride home and decided this was the thing for Southern Oregon.

Upon their return home they began the important next step - to increase the number of the core to include all the partners they would need to pull this demo site off. They decided they would need a JTPA provider (The Job Council in our area), an educational institution (Rogue Community College - they already had a forestry curriculum), an employer of record (Rogue Institute for Ecology and Economy - they were already doing a dislocated timber worker retraining project), a landowner who could provide the projects to pay for the program (both federal land management agencies had Jobs-in-the-Woods funds for dislocated timber workers), business and industry development representatives (both Southern Oregon Women's Access to Credit and Southern Oregon Regional Economic Development, Inc. were already involved in this area of work), and the contracting community who might be hiring/apprenticing the graduates of the training. The core group had previously worked with representatives of all these organizations and had developed a professional relationship with them, so recruiting them into the core was fairly easy.
What I have just described to you in actual experience is the way a successful core is formed. At this point the core recruits other individuals who can contribute to the successful start of a project site. The group decision is made that the project should move forward, in light of positive feedback from the core organizations and the community, a steering committee is formed. The steering committee is discussed in the next section.

STEERING COMMITTEE - THEIR ROLES AND RESPONSIBILITIES

Each group will have a different history than we have, a different process of inception. What we would like to stress is that you must have one too, something that you build over time with a dedicated core who develop and share a vision for their community.

The steering committee is the actual first step towards developing the training project. They develop collaborative vision and approach. They do strategic planning and act to carry out those plans. They make innumerable calls to innumerable contacts to maintain progress and meet timelines. They follow and support the direction of the core group plan. They develop the Memorandum of Understanding (MOU) to provide inter-agency clarity by assigning specific responsibilities to core group members. The steering committee identifies and maintains contact with key players at all levels. They coordinate consideration and solution of issues and develop and maintain rapport with all involved. They constantly remind themselves and other players of the inevitable “time crunch” under which they operate. The steering committee members promote and share goals of all core group members, for internal consistency.

On the page following this is a list of our steering committee members with the organization they represent. The core members are marked with an asterisk. The MOU in Appendix D contains the responsibilities of each of the core group organizations.
AGREEMENTS

The basic agreements to get a training project up and running are the Memorandum of Understanding (MOU), Master Participating Agreement (Forest Service), and Assistance Agreement (Bureau of Land Management). Should you have other federal, state or county agencies involved, there may be additional basic agreements as well.

The MOU outlines the responsibilities of each participating organization for the Ecosystem Workforce Training project, but does not talk about money. Money transfer, as well as responsibility of each of the signers, is outlined in the Master Participating Agreement and the Assistance Agreement. Copies of each one of these agreements are in the Appendix as follows:

Appendix D - Memorandum of Understanding - Rogue Valley Project
  - Master Participating Agreement - Forest Service
  - Assistance Agreement - Bureau of Land Management

Appendix D also contains the training program agreement for the Watershed Research and Training Center in Hayfork, California, another dislocated timber worker retraining site located in a hard-hit, timber dependent rural community in Northern California.

At this point I’m sure you are asking the obvious question “who pays for all the start-up expenses for this training program?”. At the Rogue Valley site, many of the partners paid for the participation of their employees in the development because the training program fulfilled a portion of their organizational mission. In the case of Rogue Institute, a non-profit who had no specific money for development of the program, a federal start-up grant was obtained to help pay the expenses. A copy of that grant proposal, “Ecosystem Workforce Training: Building Local Capacity for On-going Delivery of Jobs-in-the-Woods Training in Southwest Oregon” is Appendix E.
THE TRAINING MEDIUM - EDUCATION, PROJECT WORK

EDUCATION AND TRAINING

A special thanks goes to Mollie Owens-Stevenson, Rogue Community College, for putting together the following material for your use. Mollie has done an excellent job developing competencies and a curriculum for dislocated timber workers participating in the Ecosystem Workforce Training Project. Through her efforts a state-wide curriculum is near approval for use in other types of education and training as well. A special thanks to Bjorn Everson, as well, who put together "Nuts and Bolts" based on his experience as the Lead Crew Supervisor and field trainer for the Rogue Valley training crew.

INTRODUCTION

A number of forces came together in the late seventies and early eighties that changed the timber industry forever. Mills re-tooled, enabling them to produce the same amount of lumber with half the workforce. The market for timber mushroomed from local to international, and billions of board feet were cut and shipped out of the country, rather than being milled locally. Privately owned timber that was being grown for harvest in the future was bought in the corporate "raiding" frenzy of the eighties, and sold to the highest bidder in the international market, putting more pressure on federal timberlands. The heavy cutting of those years put new pressures on the ecosystems of the forest, and environmental groups responded by pressuring the government to greatly restrict cutting on federal lands. As a result, by 1989, thousands of timber workers were losing their jobs in the Northwest, and they were not able to return to employment in that industry.

For some workers, that was not a great loss; they were able to utilize the opportunity to re-train in a new field or move to a new location that interested them. For others, however, it was part of a greater loss of a whole lifestyle. They had no desire to work anywhere else but in the woods; no desire to live anywhere but in the small rural communities of the region. Those are the people that attracted the President's attention when he visited the Northwest in the early nineties. And those are the people for whom Jobs in the Woods was created as a part of the President's Forest Plan. And those are the people for whom this curriculum was developed.

One of the central principles behind ecosystem workforce training is that the science of ecosystem management is evolving rapidly. We now know that in fact it is a very young science and what knowledge we do have is changing daily. Therefore, the skills of lifelong learning must be central to a re-training program that is going to make workers competitive over time. If program participants are to be truly successful, they must leave the program with as much understanding of what they don't know as of what they do know, and a commitment to and skills for new learning in the areas they are interested in.

Appendix F contains two publications related to retraining displaced timber workers: "Displaced Timber Workers: Key Questions for Developing Retraining Strategies", and "A Model for Designing Appropriate Training Programs for Ecosystem Workforce Demonstration Projects".
PROGRAM DEVELOPMENT

During the first year of training, two strands of program development were going on: the certified training program was being developed by a state-wide group of program operators, in which we participated, while we also were developing a 1 year vocational certificate under the auspices of Occupational Skills Training, with the intent of eventually getting it certified to stand on its own. As it now stands, we will probably take it to the state with at least three other colleges for approval.

CERTIFIED TRAINING PROGRAM

The certified training program now has a manual that includes not only a curriculum outline, but also identifies the major concepts to be taught in each area, and includes reading for the student. It covers science, technical and business and communication skills. It does a very good job of identifying the major concepts and setting up competencies that should be mastered and providing good basic scientific information in each area. It does not teach critical thinking skills necessary to perform some of the analysis needed in ecosystem management, nor does it contain a field project that enables students to put together their scientific and technical knowledge by collecting data, analyzing the data in a cursory way, and developing stewardship proposals.

The curriculum developed by the state-wide group for use in the Ecosystem Workforce Training Program '96 is currently available from the Labor Education Resource Center at the University of Oregon in Eugene. The full program manual is contained in a 3" binder. What follows is a basic outline of Program Areas with no attempt to expand upon all of the sub-divisions contained in the master Syllabus. The curriculum includes:

A) ORIENTATION
   - Orientation to Program & Processes
   - First Aid/CPR-Certification
   - Chain Saw Safety-USFS Certification
   - Basic Fire Suppression & Safety
   - Interpersonal Skills & Group Process
   - Introduction to Education: The Learning Work-place

B) SCIENCE AND TECHNICAL SKILLS
   - Land Measurement & Survey
   - Forest Mensuration
   - Basic Geology of Erosion Control
   - Forest Ecology
   - Forest Management- Stand Level, Landscape Level
   - Wildlife Habitat Management
   - Stream Measurement & Survey
   - Watershed Management, Enhancement, & Rehabilitation - Theory & Techniques
   - Applied Fluvial Geomorphology
   - Field Study-Applied Ecology
   - Forest Restoration, Protection, & Regulation
   - Forest Mathematics
C) BUSINESS AND COMMUNICATION SKILLS
   Interpersonal Communication Skills
   Diversity & Sexual Harassment Prevention
   Written Presentation & Processes
   Oral Presentation & Skills
   Computer Skills-Integrated & Individualized
   Small Business Development
   Contracting
   Career Development Options
   Self-Assessment

The certified training program should include 160 to 200 hours of classroom instruction in classroom and field.

VOCATIONAL CERTIFICATE

Because we decided to offer a program that had some sort of state recognition, and that would be institutionalized in some way, Rogue Community College decided to both utilize its Occupational Skill Training Program initially, as well as start through the process of developing a state-recognized certificate program. Additionally, the college is a participant in the National Science Foundation grant project to develop and offer an Associates Degree in Ecosystem Management; this certificate will be a nice stepping stone between the state’s Certified Training Program and that degree. Work is underway now in the state to develop “articulation” from the state Certified Training Program to both the Apprenticeship Program and the one year Vocational Certificate; from the Apprenticeship Program and the one year Vocational Certificate to an Associates Degree; and from the Associates Degree to a Bachelor’s Degree.

The first step in developing the curriculum was to do some research into both what other programs offered, and what skills the scientific and employer communities thought were most important. The curricular material scanned included the Certificate of Advanced Mastery (CAM) in Natural Resources for the state of Oregon, the competencies for vocational certification from the state of Florida, and the Hayfork proposals. The scientific and employer communities were interviewed, and representatives of both groups participated in a DEUCM process, in which they list and prioritize skills. A set of competencies was written and circulated for comment, then finalized.
COMPETENCIES

Goals:
Students who successfully complete this program will be able to:
01. Practice forest and natural resources safety.
02. Demonstrate leadership, employability, communication, and human relations skills.
03. Survey, inventory and measure forest resources.
04. Demonstrate understanding of and apply scientific and technical principles to timber stand management.
05. Understand and apply techniques of forest management and/or restoration, especially in riparian zones.
06. Demonstrate ability to apply math and science principles to problems of ecosystems management.
07. Collect, record, and analyze technical data.
08. Report technical information about management of landscape
09. Write simple stewardship prescriptions
10. Understand basic landowner/contractor laws and regulations relative to ecosystems management.
11. Understand and apply small business management skills.

PREREQUISITES

Demonstrate a positive attitude
Work in adverse weather conditions
Work in a noisy environment
Maintain personal health
Lift 30 pounds
Work in cold water
Physical agility
OUTCOMES

01. Practice forest and natural resources safety.
   01.1 Follow safety procedures for specific job.
   01.2 Use caution and common sense.
   01.3 Identify, report and correct safety hazards
   01.4 Use and maintain safety equipment
   01.5 Demonstrate first aid/ CPR techniques
   01.6 Follow OSHA guidelines
   01.7 Follow accident reporting procedures
   01.8 Aid in controlling, using, preventing and fighting fire in forest and other lands.
   01.9 Demonstrate fire fighting techniques, as appropriate, including tool use and water
       hauling techniques, attack and mop-up strategies, and personal safety.
   01.10 Demonstrate an understanding of fire behavior.
   01.11 Organize hand crew to accomplish specific firefighting tasks.
   01.12 Use knowledge of principle environmental factors (e.g. weather, topography, and fuels)
       and apply to suppression techniques.
   01.13 Prepare and maintain equipment for storage/transport.
   01.14 Dress safely and appropriately for the job
   01.15 Demonstrate wilderness survival skills

02. Demonstrate leadership, employability, communication, and human relations skills.
   02.1 Prioritize and manage time
   02.2 Follow directions
   02.3 Work independently
   02.4 Determine tools, equipment and materials needed for the job
   02.5 Communicate in writing
      02.51 Describe observations and activities accurately
      02.52 Use English/grammar correctly
      02.53 Write business correspondence, including memos and letters
      02.54. Keep records, logs, timecards, reports, and other technical data accurately
      02.55. Develop, organize (define the issue or problems, write a conclusion), Write
              technical reports
   02.6 Interpersonal Skills: work as a team player
      02.61 Interact well with others
      02.62 Demonstrate initiative
      02.63 Participate actively
      02.64 Assist others
      02.65 Demonstrate appropriate communication skills
      02.66 Direct work groups
02.7 Communicate Orally
   02.71 Interact effectively with others
   02.72 Demonstrate phone skills
   02.73 Listen actively
   02.74 Diffuse stressful situations
   02.75 Ask questions to clarify
   02.76 Use appropriate non-verbal communication - dress, body language, eye contact, tone of voice

03. Survey, inventory and measure forest resources.
   03.1. Use land and water survey equipment
   03.2 Use liberation equipment
   03.3. Use sampling equipment (shovel, nets, flow meters, electric shocker, mask -snorkel, wetsuits, volumetric measures, tracking plate, tape recorder, megaphone, compass, clinometer, scales, saws, dip nets, pond crouders, dissolved oxygen meter, thermometer, sathurometer, electric egg pickers, volumetric sampling)
   03.4 Use aerial photos and stereo scopes
   03.5 Use maps, scales and plans
   03.6 Analyze environmental impacts
   03.7 Collect analyze and interpret data
   03.8 Identify plants using keys
   03.9 Identify animals using keys

04. Demonstrate understanding of and apply scientific and technical principles to timber stand management.
   04.1 Demonstrate and understanding of general silvicultural systems
   04.2 Demonstrate an understanding of general principles of stand management for a variety of results
   04.3 Express a variety of possible land-use management objectives suitable for a given parcel of woodland
   04.4 Describe the appropriate treatment needed to obtain a specific land use objective
   04.7 Demonstrate knowledge of basic biology and ecology
   04.8 Understand basic environmental impacts of various activities
05. Understand and apply techniques of forest management and/or restoration, especially in riparian zones.
   05.1 Use horticulture and/or landscape equipment (spreader, general garden tools, power equipment, herbicide equipment, fertilizer equipment, pruning shears, machete, chair saw, shovel, rake, pick, hose, sprayer, and still and video camera.)
   05.2 Use liberation equipment
   05.3 Demonstrate site preparation
   05.4 Demonstrate reforestation techniques, including seeding, handling, appropriate spacing planting techniques in the field, understanding seed source, understanding planting sites and comparing the economics of various reforestation methods.
   05.5 Demonstrate stream restoration techniques, including stream assessments, placement of instream structures, woody material, rocks, and other appropriate materials, culvert placement, and other restoration techniques.
   05.6 Demonstrate erosion prevention techniques
   05.7 Operate and maintain tools and equipment
       05.71 Drive vehicles
       05.72 Drive and maintain gas and diesel equipment
       05.73 Use construction and shop tools
       05.74 Use specialized equipment

06. Demonstrate ability to apply math and science principles to problems of ecosystems management
   06.1 Quantification: count or put in order: whole numbers, fractions, mixed numbers, decimals (other than money), money, percents and calendar dates
   06.2 Computation: add, subtract, multiply and divide: whole numbers, fractions, mixed numbers, decimals, money, percents, distance of lines, area, volume, weight, time, r: (speed), temperature, cost, ratio and proportion
       06.3 (a) Interpret, and then
           (b) construct drawings and visual presentation of numbers, graphs, schedules, rulers, scales and compass.
           (c) comprehend and solve word problems
           (d) comprehend and solve algebra problems using letters as symbols and using specific formulas
           (e) use formulas to examine geometric forms and shapes including 2 and 3 dimensional forms

07. Collect, record, and analyze technical data.
   07.1 Use appropriate data collection and data recording techniques, including keyboarding.
   07.2 Use appropriate data reporting techniques.
   07.3 Interpret acquired data.
   07.4 Translate from technical to common language.
   07.5 Locate information from library database and computer sources.
   07.6 Communicate data in a way that is appropriate for differing audiences.
08. Report technical information about management of the landscape
   08.1 Write technical instructions and procedures using correct form, spelling, construction and grammar
   08.2 Write mechanical descriptions and definitions using correct form, spelling, construction and grammar
   08.3 Write simple reports using correct form, spelling, construction and grammar

09. Write simple prescriptions for landowners using correct form, spelling, construction and grammar

10. Understand basic landowner/contractor laws and regulations relative to ecosystems management.

11. Understand and apply small business management skills.
   11.1Assesses own skills
   11.2Does basic market assessment
   11.3Assesses needs of business
   11.4Does basic business plan
   11.5Manages a budget
   11.6Follows purchasing guidelines
   11.7Tracks expenditures
   11.8Monitors and maintains inventory
   11.9Research vendors
   11.10Prepares bids
COURSE OFFERINGS

The next step was to develop an list of courses that would be offered for credit to the participating trainees. A major issue that we had to confront in program development was the need to train both Spanish and English speakers, and to deal with major differences in skill levels in reading, writing and math. All students entering the program are tested in math, reading and writing in their native language and Spanish speakers can be tested in English as well. The training materials were developed in both languages, and instruction was delivered in Spanish as well as English. Because many of the Spanish speakers and some of the English speakers had not completed high school, and often had major skill deficits as well (usually in writing), they needed plans to address those deficits, and sometimes needed work for a certificate of competency in specific areas rather than a vocational certificate. Once those issues were worked out, it was possible to address the kinds of courses, as well as course contents.

COURSES FOR ECOSYSTEM WORKFORCE TRAINING/JOBS IN THE WOODS
1996-97

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<th>Spring</th>
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<th>3 credits</th>
<th>2 credits</th>
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<tr>
<td>5.199</td>
<td>Selected topics in firefighting: Woodland firefighting</td>
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<td>5.781</td>
<td>Woodlands safety practices</td>
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<td>2.100</td>
<td>Human relations at work</td>
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<tr>
<td>Total:</td>
<td>2 credits</td>
<td></td>
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<td></td>
<td>9 credits</td>
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<tr>
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<th>4 credits</th>
<th>4 credits</th>
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<tbody>
<tr>
<td>1.300</td>
<td>CWE/ Ecosystems workforce training</td>
<td></td>
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<tr>
<td>Total:</td>
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<td>Field Studies: Riparian Ecology (Applegate)</td>
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<tr>
<td>4.200</td>
<td>Applied Technical Math</td>
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<td>Total:</td>
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<th>3 credits</th>
<th>4 credits</th>
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<tbody>
<tr>
<td>1.300</td>
<td>CWE/ Ecosystems workforce training</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Small Business Operations</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>(Optional: Keyboarding)</td>
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<tr>
<td>Fall</td>
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<tr>
<td>GS 16x</td>
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<tr>
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<tr>
<td>CS 101</td>
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The current list of courses reflects the requirements of Occupational Skills Training. When the program is proposed as a stand-alone, there will be less CWE, more science, and the CS 101 class will be a Computers in Science course, with a GS listing.

COURSE CONTENT

As the courses were offered for the first time, the content was developed based upon the competencies listed above. Some competencies were covered in class only, but most were developed in class (whether in the classroom or in the field), 8 to 5 on Fridays was considered class time, because there were no production expectations) and then reinforced in the field (during work time, when there were production expectations). Below are some examples of course outlines and course hand-outs. The course outlines were official documentation for the institution of material to be covered; hand-outs were for the students.

SAMPLE COURSE OUTLINE

<table>
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<tr>
<th>Course No.</th>
<th>GS 161</th>
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<tbody>
<tr>
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**Course Title:** FIELD STUDY : Riparian Ecology of Beaver and Palmer Watershed

**Institution:** Rogue Community College

**Type of Program:** Vocational

**Program Area Assignment:** Vocational

**Course Description:**
Students will explore the riparian ecology of the Beaver - Palmer Watershed, in order to understand the ecology of the area, be able to articulate some of the impacts humans have had on the watershed in the last 150 years, and develop proposals of specific activities that will lead to watershed restoration in the area.

**Course Objectives**
Upon completion of this course, students will:
1. Understand and apply techniques of forest management and/or restoration, especially in riparian zones
2. Survey, inventory and measure forest resources.
3. Collect, record, and analyze technical data
4. Write simple stewardship prescriptions.

**Length of Course:**
3 Credits of lecture-lab - 45 hours
COURSE OUTLINE (FOR STUDENTS)
UNDERSTANDING RIPARIAN ECOLOGY
FIELD STUDY CLASS, AUGUST, SEPTEMBER 1996

Outcomes:
03. Survey, inventory and measure forest resources.
   03.1. Use land and water survey equipment
   03.2. Use liberation equipment
   03.3. Use sampling equipment (shovel, nets, flow meters, electric shocker, mask - snorkel,
         wetsuits, volumetric measures, tracking plate, tape recorder, megaphone, compass,
         clinometer, scales, saws, dip nets, pond crouders, dissolved oxygen meter, thermometer,
         water meter, electric egg pickers, volumetric sampling)
   03.4. Use aerial photos and stereo scopes
   03.5. Use maps, scales and plans
   03.6. Analyze environmental impacts
   03.7. Collect analyze and interpret data
   03.8. Identify plants using keys
   03.9. Identify animals using keys

05.5. Demonstrate stream restoration techniques, including stream assessments, placement of
       instream structures, woody material, rocks, and other appropriate materials, culvert
       placement, and other restoration techniques.
05.6. Demonstrate erosion prevention techniques

07. Collect, record, and analyze technical data.
   07.1. Use appropriate data collection and data recording techniques, including keyboarding.
   07.2. Use appropriate data reporting techniques.
   07.3. Interpret acquired data.
   07.4. Translate from technical to common language.
   07.5. Locate information from library database and computer sources.
   07.6. Communicate data in a way that is appropriate for differing audiences.

08. Report technical information about management of the landscape
   08.1. Write technical instructions and procedures using correct form, spelling, construction and
           grammar
   08.2. Write mechanical descriptions and definitions using correct form, spelling, construction
           and grammar
   08.3. Write simple reports using correct form, spelling, construction and grammar

09. Write simple prescriptions for landowners using correct form, spelling, construction and grammar

Over the next 9 weeks, you will have the opportunity to study the basics of riparian ecology, learn a
variety of data sampling techniques, learn to display, examine and do some basic analysis of data, learn
some bases for natural resource decision-making, write some specifications for resource restoration, and
write restoration plans.
Some of you have asked for a review of what we have previously gone over in class, and a test of your understanding of the material. The project that you have to produce in September is that test. The restoration proposal that you are to write in September should propose some sort of work to some area of the Beaver Creek Watershed. You must base that proposal on a justification from the watershed analysis, identify the tasks you propose to do, and the purpose of each of them, the specifications of work, and the cost. Over the next 9 weeks, you will review the science required, how to construct a proposal, and how to justify it. In the final two weeks, we will learn how to write it up. That final proposal will be the basis for your grade in this class.

ANOTHER SAMPLE COURSE OUTLINE FOR STUDENTS
Small Business Development:
Course Outline for Jobs In The Woods Students at Rogue Community College

Week: Each class meeting is 3 hours

1. Overview; introduction to entrepreneurship and the issues of taking risks; the importance of identifying your product: 1) alternative practices and 2) ability to bid.

2. Basics of compiling a bid. Where to look for information about different kinds of bid

3. Lab: Students are given a recent bid to look up and bid with a resource person available. (Use a recent FS or BLM local bid; allow students to compare themselves to it when finished; if they are smart enough to go to the source and look at it, more power to them.)

4. Students present their bids and discuss the process and the resources they used to compile and compare with actual contract. Students then use conscious decision-making process to decide whether they want to pursue their own small business now, or work with for business.

5. Market Analysis: 1) Define product and services 2) Profile potential customers, competition 3) Define specific mission of your business Question: Is your product or service in demand, or do you need to redefine it?

6. Promotion of eco-systems management: 1) Identifying existing networks 2) Identify potential networks - resourcing - who are you going to tell? 3) Strategies - what are you going to tell them?

7. Presentation of Market Feasibility Studies to instructors, class, and panel of small private employer, large private corporation and federal contracting officer. Panel presentation by above.
8. Management: 1) organizational structures (single, partner, coop, corporation) 2) hiring practices 3) managing and keeping records for employees 4) evaluation of own strengths and weaknesses, and resources for assisting business in areas of weakness.

9. Financial

10. Financial

11. Luncheon with contractors, contract officers, large land-holder foresters, etc.

Appendix G is a syllabus for Watershed Restoration from Grays Harbor College.
INSTRUCTION

ISSUES OF ADULT LEARNING

motto: give them what they want and
make what they want challenging,
interesting and satisfying

Teaching in a classroom of adults is exciting and challenging; exciting because so many adults are self-directed, and challenging because so many are self-directed. Adults know what they want to learn, and often will put in lots of extra time to learn it. However, the converse is true as well; if they do not see value of a particular subject or approach, they are likely to turn you off. Nothing is harder for an instructor than to work hard to prepare a class and to have it flop. It is less likely to flop if you pay attention to the needs of the learners in the classroom.

Adults as Learners

Active
Learn through Experience
Fear Failure, "looking stupid"
Like the Problem-Centered Approach to Learning
Don't Accept Authority Figures
Don't Like to Read Out Loud
Don't Like to be Read To

SOME KEYS

In a successful program, all the participants feel included, and feel connected to the instructor. To do that, spend a little bit of time talking and listening to the students. Find out what their previous experience in this area has been, what specific interests they have in this subject, and if they have any specific learning needs or questions that they expect to have answered.

Students are more likely to be successful learners if they have positive self-expectations and build on that knowledge. Many of the participants in ecosystem workforce re-training efforts did not have positive first experiences in school; they may need help to have a positive training experience this time around. An important part of setting up a positive experience is to get the participants to focus on the possibility for success in the future, rather than on the negative experiences of the past. As an instructor, you need to set goals with students for the future, rather than focusing on how they have failed in the past or on the current assignment. As an example, you might start a class out with some hints on note-taking. Perhaps you might hand out an outline of your lecture, with lots of room on it for notes. Suggest to students that they fill in information in the outline, so that they will have something to refer back to if they need the information in the future. It's important to reinforce those positive suggestions over and over, so that the students hear and remember the suggestions, and begin to develop a new set of expectations for themselves.
A second part of helping students develop positive expectations for themselves is to assist them to see what they already know about the field. This is important for two reasons: first, students feel better about working on something when they feel some competency in the area; second, adult learners tend to build "knowledge sets" based upon what they already know. If they have a "file drawer" in their memories that is already labeled and has some facts in it, they are much more likely to retain the new information.

Finally, students who know basic study techniques are more likely to be successful in re-training. Doing a quick review of how to read for information, outline or take notes on new information, tab, highlight or otherwise mark information for retrieval later when needed, helps students remember study keys before they tackle new information.

Instructors in the classroom training part of the program may need some assistance in understanding what works with adult learners. Additionally, our experience this last year was that many of the participants had not had successful high school careers, and often do not like to sit still for lecture for long periods of time. They were much happier when they had a few hours of instruction and then time in the field to apply the material that they had just gone over in the classroom. Therefore, much of the "classroom" education takes place in the field because these adult learners tend to learn by doing. Additional effort has been introduced into the 1996 program to interface the field experience with the formal classroom time in several ways.

First, the classroom instructors were given more background in adult education, and the Education Coordinator helped them structure the class time so that no more than two hours were spent in lecture, and there was a strong field component or lab component as often as possible.

Second, Crew Supervisors with strong education backgrounds have been selected to provide on-site connection of theory with field practice.

Third, as often as possible, sessions will be in the field at the work site preceding the commencement of the work. Students will then be able connect the applicable science directly to the project at hand, making learning direct, immediate, and obvious. In addition, Crew Supervisors, agency personnel, and volunteer experts will be with the crews virtually all of the time in the field, constantly connecting the curriculum to practical application. The quality of these people is extremely important to reinforce the validity of the science and theory in the more formal curriculum.

The field education is devised to reinforce the formal classroom curriculum. It is an attempt to provide in-the-field continuity and connection to the subjects being studied at RCC. The Crew Supervisors are responsible for the training that occurs during work time, and connect with the Education Coordinator at RCC every two weeks for consistency. Additional field training takes place during the classroom time on Fridays, because the best learning takes place while the learning is having an experience with the information. We have included some examples of specific techniques, teaching tools, and processes for achieving some of the Competencies listed above. Your program will naturally require local variations upon this theme as you adapt to available resources, personal and physical.
NUTS AND BOLTS

These examples come with the caution that successful experience in teaching is a must in your program for the Education Coordinator and/or Field Supervisors. There are specific techniques (as noted above), and some very good books and articles about teaching adult learners, but these do not tell the whole story. Those persons in direct supervision of the trainees must be able to “feel the pulse” of their crew know when the best laid plans will not be well received and be able to ad lib with meaningful information at a moments notice; and know when the crew is ready to learn and when they are too tired to learn. Some basic skills that are useful to anyone involved in education include:

- **Planning** Staying in advance of information needs of participants in coordination with Community College programs;

- **Flexibility** Keeping time in perspective; developing a “grab-bag” of printed data, mini-classes for in the field; seek a wide variety of sources of information for the trainees, including agency project managers, other contractors, and written material; bear in mind that variety is critical to keeping the attention of the participants;

- **Open-mindedness** Supervisor/Instructor needs a healthy level of personal detachment and a fairly “thick skin” as insecure people vent; accepting input from all sources for consideration; able to see program problems, and work to fix these in coordination with other staff and crew members;

- **Awareness** Intuition is useful, because problems need to be headed off before they develop; and requires a sensitivity to individual needs and ability to tailor educational information;

- **Inventiveness** Willingness to try a wide range of formal and informal methods; use a variety of resources for the classroom and the field, utilizing personal and professional contacts;

**ASSESSMENT SKILLS:** The state curriculum contains an excellent chapter on a variety of assessment skills, which were taught in the classroom, and then repeated in a field class. However, the field coordinator had to review these skills over and over as a part of the work day, until the crew became proficient at them. The crew members felt that the skills were of immediate and constant use. They saw that they were learning “real” skills as they learn to pace for chain measurement, use compass, understand declination and set their compasses, measure tree heights and slope percent with clinometer, find their place on a map, learn proper placement of flagging and reference points, and lead basics of data recording on paper formats. This type of review can be very informal, extemporaneous, and bears repeating to salt these skills away. Crews members experience being “professionals” when they use professional forest mensuration tools. Additionally, this is the first step towards proficiency in stocking surveys, stand exams, tree planting inspections, and riparian assessments. When crew members reach proficiency, hand out certificates left and right...
SAWYER CERTIFICATION: The manual contains the six-page training material for chainsaw certification; however, any participating USFS or BLM agency has certified trainers. If they offer the class, your participants will be certified sawyers in the eyes of the agencies, and therefore more employable. The trainers could be a part of the cooperative agreement, and individual crew members should take the tests, including field tests, as a part of either the education component or during release time during the work week. Trees may be dropped in areas of thinning operations under the eye of the Agency personnel who are responsible for the certification. Allow some lead time as these people are in demand and usually have other responsibilities as well. Take some time and make a big deal of this.

MINI-PROJECTS: Each crew member is required to undertake a project in consultation with Crew Supervisors and the Education Coordinator. These “little” projects are started early in the program. Students should use them as a chance to identify an area in which they need improvement, then set a goal, develop a plan, and complete early in the program. Examples are: Leopoldo- 20 English Phrases in constant use, half provided by fellow crew; Eden- 25 collected species in a plant-press for identification; Zocimo-compiling and completing list of requirements for Forest Farm Labor License; Doug-interviews with agency riparian specialists resulting in a model of stream rehabilitation for use by crew during riparian habitat contract.

MINI-CLASSES: These require imagination and personal contacts to set up. One good example was connecting a trainee with a reforestation contractor, each providing 4-5 days of wages, and resulting in a trained inspector on-tap for the contractor for the next planting season. The Crew Supervisor, a former tree planting inspector for the contractor, provided the first two days of field training and familiarization, and the rest of the training was provided by the tree planting foreman on the job, and by the operational inspector also on site. This is highly personalized field education at its best.

AGENCY INTERFACE: Two examples will suffice here, Dave Patton with the Illinois Valley R.D., USFS, on a riparian thinning project, and Dave Eichammer of the Glendale R.A., BLM, on a watershed assessment project. Each of these agency personnel worked on the development of the prescription and/or protocol for their project, each was the primary inspector of “contract compliance”, and each provided in-the-field education. For the riparian thin, the silviculture and other science behind the contract specifications were provided for clarity of the complicated three-layer grid, on-site where it made the most sense. The assessment project was a three-way collaboration with the BLM, a local group of landowners, and the JITW crew. Full days were spent in the field training the crew, and then follow-up to make sure they were on-track was provided. Time and patience by agency personnel in both projects demonstrates the best that can be expected of competent, committed professionals. It must be pointed out that both of these agency people were supported by their immediate bosses, providing them the time for this training and education.
GCAP/OREGON DEPARTMENT OF LABOR: Government Contracting and Acquisition Program and the State of Oregon Department of Labor will both provide "free" speakers for your business and contracting classes. Both provide information and direction for those trainees wishing to become private contractors. Both will send people to your group with the basic paperwork, providing guidance and pitfall avoidance strategy. The trainers from GCAP have usually worked within a Federal Agency, know the people to know, and the processes to access them. Many of them are very good in individual counseling for specific problems. ODOL people are often bi-lingual, know the state requirements for contractors, and provide useful information. Having these people come to your group adds diversity as well as data.

CLIMBING INSTRUCTION: This is merely an example of a process, and you must have your own, or the means to tap them. One Crew Supervisor has had several years training tree climber basic rope-work and methods for cone collection. At least part of the crew will receive training intermittently for several weeks, emphasizing correct process and safety. This will occur during lunch and periodically during the week as the crew is ahead of production requirements. One-on-one is real nice here, and can be scheduled around your projects. The message here is two-fold: hire those with a range of experience as Supervisors, and tap all of your resources. Where possible, tie this training to agency-certified instructor, so that participants can receive agency certification for the "Resume Notebook".

GRASS SEED COLLECTION: The project hired a regional bunch grass specialist as a consultant for a seed collection contract, to ensure that the crew maintained the proper science and records. The agency was willing to have the JITW crew attempt this higher skilled job because the expert had impeccable qualifications, and the crew had an impressive record of success. Whenever possible our crews have worked to exceed production estimates while maintaining high quality work, and the project manager was not shy about trading on this reputation and the borrowed reputation of the consultant.

This list is only a beginning. Many crew members will be "easily pleased", almost any real information will be pertinent learning; others will have had several years of training and experience in projects you obtain, and helping them maintaining morale while they are doing the "same old thing" is admittedly difficult, even while others continue to learn. Use them as crew leaders and otherwise enlist them as helpers and instructors. Sometimes moving them into other projects even for a short time breaks the boredom. At times all that you will have to offer these people is the "next chance" at a different project or some of the specialized training mentioned above, (mensuration, climbing), while they are completing their 5th week of thinning... Keep seeking.
PROJECT WORK

Project work, along with education, is the heart of a successful workforce training program. Paying projects are what makes it possible to fund all the employer expenses in a training program. There should be no short-cutting in this area - if you don't make the effort necessary to procure projects and build agency (landowner) rapport you will not complete the first year. You must maintain those relationships and assure that all project work is of high quality, that trainees leave a good impression with agency (landowner) folks, that you complete all work as efficiently as the situation allows. Remember, when you have one bad project out of ten, many people judge you by that project.

IDENTIFY PROJECT NEEDS

Project needs can best be identified by looking at the competencies established for the trainees in the education portion of the training. You will want to look for projects that fulfill those competencies. For example, if you have a competency that states the trainee can demonstrate they understand care and handling of tree seedlings during tree planting, then you will want to identify a project where the trainee plants tree seedlings and, in that process, learns how to handle them, while planting, as well as how to care for the unplanted seedlings.

You will also want to look for projects that can be tied with the classroom portion of the training, e.g. classroom education is on stream ecology this week, then next week you work on a project where you are placing fish habitat structures in a stream, or doing cross-sections of a stream to determine the profile of the streambed.

The next thing to consider is what type of project will get you the most bang for your buck. If you can accomplish a number of competencies, as well as accomplish a number of classroom objectives, on one project site, efficiency of the program increases and the quality of the educational experience is enhanced. An example of this is in a project we are doing this year. The project is large - approximately two months of work - and involves thinning to enhance old growth characteristics in the riparian zone, disease control in a conifer species, slash treatment, placing fish structures in the adjacent stream using material cut in the thinning, working on longer-term projects, project layout and marking, entrepreneurial uses of the material cut that is not needed on the site, learning self-inspection of project work, and learning the fish biology of the stream. In other similar length projects we have conducted three or four classroom days on the site as well.

Projects should be one to two weeks in length to provide a variety of work learning experiences during the field season. We also look for a longer term project or two that last for up to a month each so trainees experience the feeling of going back to the same work area day after day and learn to cope with the crew interactions created by that.

Another item of great importance is what your trainees will be able to accomplish. If you do not have the capabilities of teaching heavy equipment operation to them, there is little value in identifying projects requiring heavy equipment - someone will benefit from the dollars that come in from that project, but it won't be your trainees.
Other situations to consider when developing a project needs list are:

Identify kinds of work that can be done during critical fire situations that don’t involve power driven equipment.

Identify projects that can supply the cash needed to fill out the budget year - it is highly unlike that you will be able to fill the entire year with short-term projects that are of a wide variety of experience. One example of this type project is precommercial thinning, another is building range fence. These are projects that trainees may get tired of but they also pay the bills (and wages!) and may be a reality in real life.
IDENTIFY SOURCE OF PROJECT WORK

The initial tool used by Rogue Valley for project planning, identification, and procurement is what we call a Training Work Search Matrix. The work search matrix brings together all those daily planner notes about potential projects, previous project providers, and future planned contacts into a single two or three page document. It organizes your thoughts and keeps track of the status of your contacts, as well as tying your project work search to the training curriculum and competencies. It basically helps you keep on task when searching for project work. A brief example of the matrix format follows:

**TRAINING WORK SEARCH MATRIX**

<table>
<thead>
<tr>
<th>SKILL/OBJECTIVE</th>
<th>TASK</th>
<th>LOCATION</th>
<th>CONTACT</th>
<th>JOB/NO JOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitoring/assessment</td>
<td>Vegetation survey</td>
<td>BLM-Glendale Res. Area</td>
<td>Jim Brimble 770-2255</td>
<td>No job</td>
</tr>
<tr>
<td></td>
<td>Reforestation survey</td>
<td>Rogue River N.F.</td>
<td>Steve Bulkin 858-2324</td>
<td>No job</td>
</tr>
<tr>
<td></td>
<td>Evaluation Plantation</td>
<td>Rogue River N.F.</td>
<td>Johan Visser 858-6176</td>
<td>No job</td>
</tr>
<tr>
<td></td>
<td>Stream Measurement</td>
<td>U.S. Fish and Wildlife</td>
<td>Dan Perrit 503-231-6179</td>
<td>No job</td>
</tr>
<tr>
<td></td>
<td>Engineering/land survey</td>
<td>Siskiyou N.F.</td>
<td>Dan Magallanez</td>
<td>No job</td>
</tr>
<tr>
<td></td>
<td>S. Fork blowdown assess</td>
<td>Butte Falls R.D.</td>
<td>Chris Lewis 865-2739</td>
<td>No job</td>
</tr>
<tr>
<td>Density management</td>
<td>Roadside brushing</td>
<td>BLM-Butte Falls R.A.</td>
<td>Bob Smith 770-2258</td>
<td>Job</td>
</tr>
<tr>
<td></td>
<td>Precommercial thin-LSR</td>
<td>BLM-Glendale R.A.</td>
<td>Jim Brimble 770-2255</td>
<td>Job</td>
</tr>
<tr>
<td></td>
<td>Riparian thin in LSR</td>
<td>Illinois Valley R.D.</td>
<td>Dave Vezie 592-2166</td>
<td>Job</td>
</tr>
</tbody>
</table>

ETC.

Following is a list of potential landowners to contact. Once again, these apply to the Rogue Valley area and may be different in your area:

- Local Watershed Councils, Soil and Water Conservation Districts, or municipal watersheds
- State land management agencies - Oregon Department of Forestry, Oregon Department of Fish and Wildlife
- Local land management agencies - Josephine County Forestry, City of Ashland
- Federal agency personnel other than Jobs-in-the-Woods - Corp of Engineers, regular agency projects
- Private landowners - Weyerhaeuser, Boise Cascade Corporation, Pacific Power
MATCH NEEDS WITH SOURCE

Matching needs with source is simply implementing your Training Work Search Matrix. This is a time-consuming process, complicated by such things as the Congressional budget process, changes in agency/landowner direction, and changes in agency/landowner personnel.

One factor that appears to be very important in identifying and securing projects is the person doing so should have either worked for, or been associated with in some way, the agency/landowner(s). Based on the experiences of half a dozen Project sites, the sites with ex-federal employees or former cooperators of the federal agencies have had a much easier time securing projects than someone new to the agencies. Most of this is due to rapport and trust developed previously. It is very important to keep this in mind when budgeting time for this part of the project.

Timing is a very important factor. Last year, our first year, was fairly easy because everyone was focused on this new training program, and even though people needed to be oriented to what it was all about, were willing to give it a shot. Budget was much larger last year as well. This year has been a different matter. Even though we started in November (1995), government employee furloughs, late budget approval by Congress, and an increased agency emphasis on meeting timber harvest targets stalled our agreements until the beginning of the work portion of the program. At this writing (July, 1996) we are still short about 20% of the projects needed to fill the work period. This has prompted us to approach a variety of landowners a year in advance of the beginning of the '97 program year so that we make our project needs known at a time when agencies/landowners are putting together preliminary project plans and budget requests. As of the date of this writing, Rogue Valley EWTP has commitments from our federal partners for the work needed to complete the basic FY '97 work training unless some major budget change occurs.

We are also diversifying to additional landowners with longer term (stewardship) projects with the idea of reducing the impact on our previous partners as well as assuring the sustainability of the training program. By doing this we feel we are actually becoming a part of the landowner's annual work program rather than a temporary "jobs" program.

When you are contacting these folks from different organizations, expect to hear the words "we don't have any projects for you now" and "that's really more expensive than we have money for" on a fairly regular basis, but don't let that discourage you! Every once in a while you run across that person that for some unknown reason, has decided he/she wants to support the effort you are promoting and comes up with not one, but three or four projects. This is the person you want to immediately put into your as a program supporter and a person you want to go to when you have a need. You will find after a while you have eight or ten of these project or management folks behind your effort and then it becomes much easier to find projects, especially if your crew has done high quality work, performed more than expected, and cut down the time invested in the project by the project person.
Recruiting projects is never an easy task. In many project level manager’s eyes, you have to be competitive with local contractors when vying for project work. Many managers understand this is a training program, and as such, will not have as high production as a contractor, but there are still many that don’t understand. Just be patient with them and continue to work with them - they may come around eventually. Never give up, supporters come from surprising arenas. Never badmouth managers that don’t currently have a project - they may become strong supporters at some future time.

Persistence pays off, but you also need to know when to back off and not “push the envelope” too much. Maintaining a good working relationship (rapport) with all your partners is always the best advice.

Other conditions to consider are:

Projects selected have adequate funds to cover project costs and can be completed within the timeframe of the work portion of the training program.

That you either know the project area and the work required or go look at the area prior to signing a work agreement. Nasty surprises can hurt the quality and sustainability of the training program.
PROJECT AGREEMENTS

Project agreements are the vehicle that the Forest Service and BLM use to transfer money from the agency project to the Employer of Record. These documents talk about dollar figures, amount of work, timeframe, specifications, etc. For the Forest Service this document is called the Supplemental Project Plan to the Master Participating Agreement, and for the Bureau of Land Management this document is called a Task Order and is referenced to the Assistance Agreement. The Forest Service also has an Amendment to the Master Participating Agreement that allows the use of certain facilities and equipment. Examples of the Supplement, the Task Order, and the Amendment are in Appendix H. Descriptions of responsibilities of each follow. Never start work on a project until the appropriate agreement has been signed. You may end up doing a project for free if an agreement is not in place.

SUPPLEMENTAL PROJECT PLANS - FOREST SERVICE

The Supplemental Project Plan to the Master Participating Agreement consists of work statement (pro- description), period of performance, financial project plan, and signatures. This portion of the agreements, as well as other agreements for the training program, will be handled by the person responsible for agreements on each National Forest. That person will coordinate the filling out of the agreement, obtaining signatures, and processing billings against the agreement.

Once a project or group of projects is agreed on the project person responsible for the Forest or Range District Jobs-in-the-Woods program will complete all of the work statement and period of performance portions of the supplement, as well as the Forest Service in-house, funding to cooperator, management code, and fund code portions of the financial project plan. The supplement will then be forwarded to employer of record to provide the breakdown of the funding to cooperator, and the cooperator’s contribution, as well as in-kind contributions. Once the supplemental project plan is filled out, it goes back to the Forest Service agreements person who then obtains the necessary signatures. Once the signatures are in place the work can began.

PLEASE TAKE NOTE - cooperator matching funds of up to 50% of the project total are required on Forest Service supplemental project plans. This is often very difficult for cooperators, especially non-profit cooperators, to meet. Keep this in mind when planning your program budget.

TASK ORDER - BUREAU OF LAND MANAGEMENT

Task orders are a considerably different means of transferring moneys to the employer of record. There are no matching funds requirements, the agency basically handles the process after projects are agreed on, and the document travels through the BLM contracting organization. It consists of a heading which refers to the Assistance Agreement (contract number), a description of work, accounting information, and signatures.

Once the projects are agreed upon, the agency project lead prepares the bulk of the task order and forwards it to the District Jobs-in-the-Woods coordinator (also known as the Assistance Representative) who then forwards it to the State Office for signature of the Contracting Officer (also known as the Assistance Officer). Once signed by that person, work can proceed.
An effort was made in November, 1995 to use the BLM Assistance Agreement to transfer both Forest Service and BLM monies to the employer of record, but a difference in authorities of the two agencies precluded that happening at the time. The effort should continue to be pursued as agencies continue to modify how work is contracted to dislocated timber workers.

AMENDMENT - FOREST SERVICE

Amendments to the Master Participating Agreement have been used, in our case, to transfer use of facilities, vehicles, etc. to us. The amendment has normally been written in letter form spelling all conditions of use, liability, payment for use, etc. and is signed by the same individuals who sign the supplements. They have worked well for both parties, and in all cases, put Forest Service equipment or facilities to use that were lying idle. As with other agreements, wait for signatures that approve the action before proceeding.
HIRING THE TRAINEE

Hiring high quality trainees is another very important part of a successful Ecosystem Workforce Trair Project. Selecting people with clear future goals, a high level of motivation, and a commitment to participate in this program for what they can glean from it is essential. If a person is just looking for another job, you don’t want that person. They will hold back the rest of the group.

RECRUITMENT

To be able to select high quality trainees, you need to have a large group of quality candidates; to have quality candidates you must do an aggressive outreach. That means going to where the candidates are. If you are looking for dislocated timber workers, go to the job retraining organizations that work with them, place flyers advertising the program in the communities where they live (example in Appendix), and talk with people who may know of someone interested in the program.

OUTREACH TO WOMEN AND HISPANICS

To outreach women and Hispanics, the same applies; go to organizations that represent women and Hispanics in your area, place flyers in the communities where they live, and talk with people who may know of someone looking for an opportunity. We found that Steering Committee members along with The Job Council and Rogue Institute were an excellent source of recruitment.

Recruitment should start four to six months in advance of screening and hiring or somewhere around November 1. To reiterate, recruitment must be handled aggressively if you want to end up with a list of highly qualified candidates.

SCREENING

The screening of candidates for the Ecosystem Workforce Training Project occurs at two levels. The first level is a more general screening by the JTPA provider (The Job Council) to assure the candidate meets their criteria to enter into a dislocated timber worker retraining; the second level is to screen candidates prior to the final selection into this program.

The timeline for the second level of screening usually starts about two months prior to the day the trainees will actually be hired. The first month is final outreach to candidates, enrolling in The Job Council, screening orientations, getting applications turned in, and gathering other information needed for evaluation of the candidates by the selection panel.

The interview questions should be developed by the panel during this time period, as the last month before hiring can become a little hectic! We allowed a week for each process in screening and hiring. Sometimes it was more, sometimes less. People involved in the final screening, interview, and hiring need to build a lot of flexibility into their schedule to prevent stressing out over last minute changes, because there will be some. Interviews should be set up over a period of two or three days depending the number of candidates. To allow more time than that adds inefficiency and stress. Six hours of interviewing a day also seemed to be a maximum - beyond that you don’t even know who you are, let alone who the next interviewee is!!

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WORKER RETRAINING CRITERIA

The Job Council runs each potential job training applicant through a series of screenings/processes prior to entering them in a worker training program. Those are:

- A pre-application to determine the person's eligibility for The Job Council's services.
- A group orientation telling what The Job Council does.
- An individual pre-assessment and eligibility verification.
- Review of client's initial plan by a group of counselors; recommendation for further service.
- An assessment of skills, abilities, knowledge, goals, problem areas, etc.
- Applicant is assigned to a case manager.
- Develop a final training plan.
- Review of the final plan by a group of counselors to be sure it meets The Job Council's requirements.

ORIENTATIONS

Once a person has been directed to the Ecosystem Workforce Training Project, they are scheduled for a group orientation on what is involved in the entire program. Partners in the EWTP present different aspects of the project. For example, The Job Council talks about eligibility, selection timeframe, labor market information, and other JTPA programs; Rogue Community College presents details about the education they can expect; Rogue Institute talks about overview of the program, day to day operation, expectations of the trainees, supervision, etc.; one of the agency representatives describes the work and working conditions; and Southern Oregon Women's Access for Credit presents entrepreneurial programs. A copy of the agenda from the 1996 orientation is included as Appendix J.

At this point most individuals will choose to continue forward with applying for a position in the training program; some may want to think about it some more and may even have program questions a day or two later; while the remaining few will choose not to participate further. This orientation is essentially a self-screening based on an individual's desire to participate or not and greatly facilitates the selection process.
INTERVIEW PROCESS

PANEL SELECTION

The makeup of our most recent interview panel included the education and training coordinator (RCC), the Job Council case manager, the work program coordinator (RIEE), the Lead Crew Supervisor (RIEE), and an agency person (Forest Service). The feeling of the entire steering committee was that interviewers should be the people most closely associated with the trainees throughout the training program. We selected an agency person from the Forest Service this year since a BLM person was on the panel for 1995. This also happens to be the same group of people that work most closely together during the program making it a ideal opportunity to build trust and a good working relationships within that group.

APPLICATION REVIEW, REFERENCE CONTACT

Having decided to pursue the training program, the potential trainees then complete an application that includes personal data as well as work experience, education, special skills, etc. In our case the personal data is kept confidential by The Job Council, since it includes income, personal finances, personal problem areas, etc.

Each member of the selection panel reviews each application for appropriateness to the training program, writing down questions about information on an application, contacting references if necessary, and making a judgment about whether the applicant should be interviewed for the program. The group meets and compares notes and makes a decision as to the people to be interviewed. The JTPA provider then contacts all applicants and arranges a time for interview, or notifies the applicant they are no longer being considered.

INTERVIEW

As mentioned in the “Screening” section, all interviews are scheduled within a two or three day period. The Job Council scheduled all the interviews after first making sure all interviewers would be present during each interview. An interpreter was available for Spanish-speaking applicants for both the oral interview and a series of written questions.

Two sets of questions were prepared for the interview process; the actual interview questions that help determine the individual’s motivation for entering the program, their commitment to staying through the whole program, what their long range plans are, etc.; and the written interview questions that delve into work experiences, skills, supervising ability, driver’s license limitations, personal ability to participate actively in the program, plans during the non-work time, etc. Examples of these two sets of questions are included in Appendix K. These questions were modified significantly from the 1995 questions, which we felt assessed previous work skills, rather than life planning, motivation, and commitment. Lack of motivation and commitment was a problem in some of the 1995 trainees and we wanted to be sure we were assessing that in the interview process.
Prior to the beginning of the interviews, the panel met to discuss the format of the interview process and to assign individual questions to each interviewer. At that time we also assigned points to each question to later be used in quantifying each interviewee's responses. We assigned a maximum of 10 points each to the oral interview questions and 5 points each to the written interview questions. The written question points would only be used to break a tie if two candidates appeared equal.

During the oral interview the panel took turns asking their assigned questions. Each panel member took notes to support their rating on each question, then assigned a number ranking to the applicant’s response - 0 being the lowest score, 10 the highest score. At the conclusion of the oral interview, the applicant was handed the written interview questions and taken to a separate room to complete them. By this system we had one person being orally interviewed and, at the same time, another person answering written questions.

We attempted to put the applicants at ease, but kept the mood professional as well. Panel members were not allowed to vary from the oral questions, other than putting in their own words, to maintain uniformity and to assure that questions on inappropriate subjects (Are you married? How many kids do you have? etc.) were not asked. Other than asking questions and receiving responses, there was not a lot of additional conversation. The intent was to provide equal opportunity for each applicant.

**FINAL SELECTION**

For final selection each panel member added up each applicant’s total numbers (that panel member’s evaluation for each question) and that number was added to the totals from the other panel members. The result was the applicants being ranked 1, 2, 3, etc. by their total evaluation numbers. The panel spent a few minutes going over notes and assuring themselves that the numerical ranking was indeed how everyone felt about the individual candidates. Each panel member was very consistent, in relation to other panel members, in their ranking of applicants. In Rogue Valley’s most recent selection process, there were 17 applicants interviewed and 14 trainees selected. A small number of applicants interviewed is not the recommended procedure - we were just lucky! It would be much better to have twice the number of applicants interviewed as positions to fill. All applicants were notified of being hired, or not, within 24 hours.

**RELATED FORMS**

Appendix L contains trainee hiring related forms such as Ecosystem Workforce Training Program Basic Personal Data, Employment Eligibility Verification (Form I-9), and Ecosystem Workforce Training Program Master Application.
PROJECT MANAGEMENT & SUPERVISION

SUPERVISION AND TRAINEE MANAGEMENT

Many hard lessons were learned in the first year of administering this training program and a previous year of the Special Forest Products Assessment crew (focused on dislocated timber workers as well). Among the most important lessons, for which corrective measures have been taken in this year’s program, are the following:

- Adequate mid-level supervision is an almost constant necessity. Trainees are undeniably all too human, and without direct and constant supervision, demonstrate a panoply of negative behavior. Production disappears along with quality, inaccuracies abound in records, interpersonal squabbles multiply, and learning and fun are gone. The same crews with adequate, constant supervisor feedback are nothing short of outstanding. This year a full-time supervisor with both education and production backgrounds will be with each crew all of the time.

- Trainees need very clear limits concerning unacceptable behaviors. When participants demonstrate many problem behaviors, they need to simply be terminated. A Pass-Fail set of Criteria will help identify these early on, provide correction to participants who are receptive, and termination of those who aren’t.

- Many dislocated persons have a long history of job search, short-term success, long-term marginal income. After a period of time, some individuals develop a defeatist, self-deprecating attitude or concept. These are very hard people to work with as they expect defeat and have little self-confidence. These things must be grown first, or at least along with, to have the crew and the program experience success. Short-term, highly visible goals and results are a necessity, giving people some immediate positive feedback.

- Sometimes giving the “extra chance” is exactly what a person doesn’t need. They see that as a sign of weakness, and take advantage of it until a larger perspective is gained. Clear sanctions and perhaps a sacrificial lamb or two to show that the program will not tolerate a lack of seriousness suggested by many of the last year’s graduates. This year, more people were hired than are expected to complete the program successfully; based upon last years proportions we expect to lose one or two when we follow through for unacceptable behavior which a trainee does not change.

- Heavy sarcasm is worse than pointless, reinforcing individual worth creates phenomenal bursts of growth and learning, and when the individual “catches on” to the concept that he/she is responsible here, they are usually a challenge to keep up with! Dedicated teachers, knowledgeable field personnel, and a completely revamped curriculum at the college level will all assist this years crew in their educational process.

- Providing opportunities for managers to vent is essential, so they don’t end up turning their frustration to the crew in ways which reinforce negative expectations.
SUPERVISION RESPONSIBILITIES

**EWTP Project Coordinator:** The Project Coordinator retains the ultimate responsibility and authority at the program level; develops and monitors budget; maintains liaison with the other Program partners; recruits work projects; reviews and signs agreements; and provides general oversight to supervision of trainees.

**Crew Supervisor:** The crew supervisor is the primary contact for the trainee related to work conditions, project implementation, evaluation of trainee performance, pay, and supervision. There will be two Crew Supervisors this year to provide the critical middle level supervision. Their duties will include:

- More or less constant direct field supervision of trainees and projects. It is expected that both Crew Supervisors will be in the field with the crew the first two months 80-90% of the time to be available in situations requiring administrative field decisions.

- Continual evaluation of each trainee using standard forms mentioned in the Expectations and Program Requirements section.

- Additional responsibilities related to entrepreneurial education and forest product material marketing (from the job sites) will be added to the Lead Crew Supervisor's duties for the following months of the program. It is expected that this person will then spend approximately 20% of their time in direct field supervision and 80% in forest product marketing, field-level education, and other administrative time. The other Crew Supervisor is expected to have non-field administration of 20% of their time.

- The Crew Supervisors will be responsible for overseeing the logistics of the Work Leader Trainee described below. Time, forms, and adequate one-on-one supervision of each Work Leader shall be provided.

- Crew Supervisors are expected to be selected partly on the basis of specific skill areas such as assessment, reforestation, contracting, riparian management, upland prescriptions, tree planting, crew management. Crew Supervisors may be expected to teach, both formally with the whole group, and informally at the work site, these specific skills throughout the program. Each Supervisor will follow the training program curriculum and lesson plans for field training timeline outlined in the Education and Training section.

**Work Leader Trainees:** Each trainee rotates in one month "shifts". Primary function is as a work coordinator; understudy to the Crew Supervisors with the goal of learning how to supervise and coordinate a crew; has primary responsibility for tools, time slips, and vehicle maintenance; has no authority as a superior of other trainees; advocates for other trainees in the Grievance Procedure outlined in the Personnel Policies (Appendix N). Scheduling of crew logistics is of primary importance; this include numbers of people assigned to specific work areas, estimates of mileage and time, daily work hours, meeting times, etc.
POSITION DESCRIPTIONS

It is very important to spell out individual position responsibilities and clarify responsibility boundaries between different positions, different agencies, etc. Failure to delineate responsibilities results in more than one person accomplishing the same task, or worse yet, nobody accomplishing an important task. The MOU spells out individual agency responsibilities in the partnership, position descriptions assign those tasks to individuals within each organization.

Appendix M contains position descriptions for EWTP Project Coordinator (employer), Lead Crew Supervisor (employer), Crew Supervisor (employer), Ecosystem Workforce Trainee (employer), Education Coordinator (educator), Trainer (educator), and Translator (educator). Other position descriptions are available from participating partners.

PERSONNEL POLICIES

Appendix N contains personnel policies for Rogue Institute for Ecology and Economy. These are specific to our organization and might not fit your situation, but they were drawn from a sample set of personnel policies and are considered to be acceptable in most organizational situations. These policies were not formally presented to the trainees as personnel policies they were to follow in 1995 and, as a result, there was confusion as to what policies applied to them and which didn’t. Between training programs the policies were revised to fit the trainee’s situation, including a drug policy, approved by the RIEE Board of Directors, and handed out to the trainees during their work orientation. They were asked to acknowledge receipt of the personnel policies, that they understood them, and that they agreed with them. Problems associated with the lack of policy last year are non-existent this year. Personnel policy should be a part of any organization, no matter how small.

DRUG AND ALCOHOL USE POLICY

A sample of a drug and alcohol use policy is included in Section 702 of the Personnel Policy in Appendix N. Again, this is the policy for Rogue Institute for Ecology and Economy and reflects the drug and alcohol use policy the Board of Directors expects the RIEE staff to abide by. This is a fairly lenient policy and requires drug testing only when there is a reasonable suspicion of use (suspicion-based policy). This policy was suggested by our attorney and contains appropriate language. There is a problem with minor drug use on the 1995 trainee crew and it became very apparent that we needed a means of requiring drug testing if this should occur again. As with other information presented in this manual, this may fit your situation, but if it doesn’t, you have a point to start from in making a policy that fits your particular needs. Feedback from other demo sites indicates drug use on the job is a definite possibility and must be addressed.
EXPECTATIONS AND PROGRAM REQUIREMENTS

This training program requires a high level of personal commitment and the awareness that there will be times of personal growth for which there is no compensation, such as homework time. The expectations include the following areas/categories which shall be used by Crew Supervisors to evaluate each trainee's growth towards professional contract/work ethic. During the initial phase of the program trainees shall be evaluated by the Crew Supervisor weekly on a private, individual basis. In the second phase following the Pass-Fail Checklist, evaluation will be less frequent, but still be on a regular basis.

- Professional Punctuality--15 minutes in and out from time of arrival at place of work

- In order to remain as a Trainee, 90% participation in the program is required and expected in all phases of the program, education and field work.

- Accountability--Important to personal success. Accountability relates to self and employer.
  SELF - time management, equipment, transportation;
  EMPLOYER - accurate timekeeping, mileage, "single issue items", vehicle care and maintenance for Work Leaders.
Pass-Fail Checkpoints shall be developed as part of the program requirements to evaluate each trainee growth in professional responsibility. The Checkpoints are to be sequential, each Checkpoint needing be passed in sequence, for the trainee to be retained in the program. The Checkpoints are to be specific and be quantified, and will continue to be evaluated throughout the program. Initially, each is a Pass-Fail Checkpoint, and then becomes a regular part of performance evaluation by the Crew Supervisor, follows:

<table>
<thead>
<tr>
<th>CHECKPOINT</th>
<th>TIMEFRAME</th>
<th>CRITERIA</th>
<th>TOLERANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Committe</td>
<td>Week 1 &amp; 2</td>
<td>Comes to work on time with no excuses</td>
<td>80% (8 of 10)</td>
</tr>
<tr>
<td>2) Transportation</td>
<td>Week 3</td>
<td>Has reliable personal transportation set up (legal, insured, functional, OR ride-share)</td>
<td>Standard Form 1 Warning</td>
</tr>
<tr>
<td>3) Follow Through</td>
<td>Week 3</td>
<td>Brings specifically assigned items</td>
<td>60% (6 of 10)</td>
</tr>
<tr>
<td>4) Initiative</td>
<td>Week 4</td>
<td>Has Independent Study Topic by Week 4</td>
<td>Pass-Fail</td>
</tr>
<tr>
<td>5) Records Falsification</td>
<td>Week 4</td>
<td>No Falsification of time, mileage, data, etc.</td>
<td>Standard Form 1 Warning</td>
</tr>
<tr>
<td>6) Harassment</td>
<td>Week 4</td>
<td>Follows RIEE Personnel Policy Sec. 703</td>
<td>Standard Form 1 Warning</td>
</tr>
<tr>
<td>7) Personality Conflicts</td>
<td>Week 5</td>
<td>Does not maintain conflicts at work</td>
<td>Standard Form 1 Warning Only</td>
</tr>
<tr>
<td>8) Responsibility</td>
<td>Week 5</td>
<td>Work Leader/other crew responsibilities provided intentionally by Supervisor(s)</td>
<td>75% (3 of 4)</td>
</tr>
<tr>
<td>9) Production</td>
<td>Week 8</td>
<td>Maintains defined production norms</td>
<td>Standard Form 2 Warnings</td>
</tr>
<tr>
<td>10) Crew Dynamics</td>
<td>Week 10 on</td>
<td>Regularly assumes leadership within the crew, evaluated by Supervisor weekly</td>
<td>Standard Form 2 Warnings</td>
</tr>
</tbody>
</table>

Standard Forms shall be used by the Supervisor for the Weekly Evaluation of each trainee and for each infraction listed above. This helps to make the problem behaviors preventing successful completion of the checklist objective, and something which may be "discarded" as a wrong answer by the trainee. An automatic referral is made to The Job Council Case Manager to ensure the trainee has the appropriate problem solving tools and skills. When a pre-determined number of unsuccessful Checkoffs is made, for termination from the program, that trainee may be fired. Some negative behaviors are more tolerable/trainable than others; note numbers 5, 6, 7, and 8, above. Standard Forms are available in business form books such as The Business Agreements Kit by Ted Nicholas (ISBN 0-936894-90-3). Some are included in later Appendices.
TRAINEE CONTRACT WITH EMPLOYER OF RECORD

A tool we use at Rogue Valley, to “assign” responsibility for their behavior to the trainee, is to have them sign a contract with us as Employer of Record. Many of the expectations of the trainees, mentioned in the section above, are included in that contract, as well as what we, as employer, are expected to provide/do. An example of that contract is in Appendix O.

SAFETY

The use of personal safety gear and safe working methods is required at all times on projects. Before each new project, specific hazards will be discussed. A tailgate safety session shall be conducted by the Crew Supervisor(s) each week on a regular basis. Trainees who consistently use unsafe methods as determined by the Crew Supervisors, shall not be allowed to continue in the program. In the “real” world of land restoration contracting, the use or non-use of safe working methods can make or break the job.

In addition to the required hard-hats, boots, and gloves, long pants and long-sleeved shirts are recommended. Use of sunscreen is recommended. Those persons allergic to bee stings must have a sting-kit and notify the Crew Supervisor of this condition. Poison oak, yellowjackets, and rattlesnakes will be in many project areas, and appropriate measures should be taken by the trainee to minimize exposure.

EQUIPMENT & TRANSPORTATION

Because budgets are small and cash flows are sometimes negative in a non-profit organization, some of the following are suggestions to maximize available dollars, both for equipment and transportation purchases, as well as payroll, etc.:

- Upon initial startup ask for an advance payment, in excess of the amount needed to do initial project work. Use this amount to purchase initial tools and equipment. This amount will be paid back through the course of the program.

- Establish a line-of-credit for $20-25,000 to create a source of capital funds. Use only when absolutely needed, e.g. to make payroll in face of late billing payments. Remember, this has to be paid back out of the next invoice payment!

- Only purchase the basics in tools and equipment, such as shovels, pulaskis, hazel hoes, chainsaws and accessories. Equipment that is only used for one job, such as pole pruners, chainsaw winches, tree planting hoes and bags, special fence-building tools, etc. will often be loaned by the agency with the project, if you ask.

- Some tools and equipment can be purchased at discounts or received through donation.
The following suggestions apply to transportation:

- Dollars available will very seldom pay for a late model crew vehicle in excellent shape, so you have to be creative. We were able to lease/purchase an older van in very good condition to get us through the first year. We purchased a second van that was not in good condition and that turned out to be less than perfect situation. I would suggest spending an extra $2-3,000 and avoid a "money pit".

- Government surplus vehicle auctions are a good sources of well-maintained vehicles. If you a non-profit educational institution, you may qualify for the Oregon State Surplus Property Program, or similar program in your state. This entitles you to purchase government surplus vehicles at the agency’s capitalized cost without competition.

- Rent or borrow agency surplus vehicles if you don't desire to make capital investments in vehicles. In most cases this is done with an amendment to the Master Participating Agreement with the Forest Service.

In all cases it is important to maintain all tools, equipment, and vehicles on a regular basis. To do otherwise only increases your capital and repair costs. In addition, a good equipment signout with strict return policies will insure you don’t "lose" equipment.

RELATED FORMS

Appendix P contains a number of project management related forms such as Ecosystem Workforce Training '96 - Equipment Sign-out Agreement, Ecosystem Workforce Training Program - Work Schedule for___ (and a completed version), RIEE Ecosystem Workforce Training/Equipment Inventory (and a completed version), Rogue Institute for Ecology and Economy Tailgate Safety Meeting, Forest Service Driver’s Safety and Preventive Maintenance Inspection and Equipment Maintenance Record, Vehicle Daily Log, Rogue Institute for Ecology and Economy Request for Time-off or Vacation, Crew Leader’s Daily Summary (in Spanish and English), and Project Workplan.
FINANCIAL PROCESSES

BUDGET

An example of a spreadsheet version of the budget for the Employer of Record at the Rogue Valley Ecosystem Workforce Training Program site is on the following page. It is a DRAFT budget for the current fiscal year (1996) and reflects amounts larger than the actual current budget. Categories shown give the potential budget preparer an idea of expense items to consider when budgeting. There are a couple of line items on the spreadsheet that need defining: "OPE" is Other Personnel Expenses and includes all your benefits required by law (Social Security, Workers Comp, Unemployment, etc.) as well as benefits you may provide, such as health insurance. "D & O Insurance" is Director's and Officer's liability insurance. Most of the rest are self-explanatory.
### Sustainable Jobs

<table>
<thead>
<tr>
<th></th>
<th>BLM</th>
<th>Forest Service</th>
<th>96 Project Develop</th>
<th>97 Project Devel</th>
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<tr>
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<td>7,695</td>
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<td>Printing</td>
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<td>250</td>
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<td></td>
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<td>735</td>
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<td>Equipment Maintenance</td>
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<td>600</td>
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<td>Conferences-attending</td>
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<td>Long distance phone</td>
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<td>35</td>
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<td>other: (specify)</td>
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<tr>
<td>Interpretation</td>
<td>495</td>
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<td><strong>Subtotal expenses</strong></td>
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<td>38,265</td>
<td>2,544</td>
<td>9,535</td>
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<tr>
<td><strong>TOTAL BUDGET</strong></td>
<td>180,991</td>
<td>180,988</td>
<td>9,864</td>
<td>29,238</td>
<td></td>
</tr>
</tbody>
</table>
COST PER HOUR

Appendix Q is the Breakdown of Hourly Billing Rate for the current operating year (1996). Most projects at the Rogue Valley site are put under agreement at an hourly rate and that is the means by which we bill for projects. Other demonstration sites use a variety of means to determine how they will bill for project work. Some methods I am aware of are: Hayfork in Northern California is paid a lump sum amount to complete a project, Tillamook in Northwest Oregon negotiates an amount to complete a project, mid-Willamette bids so much per unit of measure (acre, etc.) similar to contracting.

How you are paid is based, in large part, on how your project partners feel comfortable in paying you. Our site is moving toward bids per unit of measure, and partial payment for work with the rest of the payment coming from sale of by-products of our project work. Time and materials (being paid by the hour) is very nice for non-profits because there is very little monetary risk, but as agency and landowner budgets drop, so does their willingness to pay by the hour. We are maintaining good production records this year in order to be able to “bid” projects next year with a minimum of risk to our organization.

Our hourly rate is determined by dividing the total budget amount by the number of production hours you expect to put in to complete the projects covered by the budget. We actually work it backwards from that method in that we figure how many hours the trainees (and crew supervisors, if they are contributing to production) will be working in the program, then find enough projects to cover those hours. Our crew supervisors have been doing production work from 20 to 80% of the time with their remaining time in project administration (timesheets, vehicle repairs, equipment purchase, etc.).

On the hourly billing rate sheet in Appendix Q, you see a total budget of $347,120 and 13,697 project work hours. Using the formula presented at the beginning of this section, you end up with an hourly billing rate of $25.34.

BI-MONTHLY, MONTHLY BUDGET STATUS REPORTS

Appendix R contains two documents. The first is a report of productions hours worked, by project. This information comes from the timesheet and has a pay period summary and a to-date summary. The second document is a spreadsheet showing a to-date summary of income and expenses. This comes out two or three days after the end of the month and is very useful in monitoring how your budget is doing.
PAYROLL AND ACCOUNTING

To prevent a lot of confusion and chaos, make sure that your program has the necessary MOUs, agreements, and necessary contracts into the main files before money is spent. Great amounts of time will be saved not having to track down contracts before any audit procedures. In addition the following information needs to be in hand before spending any money on the project:

- two copies of the grant agreement, contract, or task order. If the money comes from a foundation the person tracking grants will for your organization will need a copy too, preferably the original.
- copies of any documents signed before sending the original back to the relevant agency.
- a budget for how you intend to spend the funds.
- a clear statement of the process to be used for billing, including key contact person, address, and billing calendar.

No money should be spent, including salaries, until the above is received by the Administrative Coordinator.

TIME SHEETS

Accurately recording time worked is the responsibility of each employee. Federal and state laws require the employer of record to keep an accurate record of time worked in order to calculate employee pay and benefits. Time worked is all the time actually spent on the job performing assigned duties.

All employees should accurately record the time they begin and end their work. They should also record the beginning and ending time of any split shift or departure from work for any reason other than performance of work-related duties for the employer. Not only is an accurate record needed of the total hours worked by each employee, also needed is an accurate record of hours worked in each program and project area. This breakdown will be shown on each individual employee's time sheet.

A sample time sheet used by the trainees is shown in Appendix S. Note that this time sheet keeps track of hours worked by the categories required for the State Apprenticeship program.

 Altering, falsifying, tampering with time records or recording time on another employee's time sheet will result in immediate disciplinary action, including, but not limited to, termination of employment. It is the responsibility of each individual employee to accurately fill out the time sheet.

It is the employee's responsibility to sign his or her time sheet to certify the accuracy of all time records. The supervisor will review and then initial the time record before submitting it for payroll processing. In addition, if corrections or modifications are made to the time sheet, both the employee and the supervisor must verify the accuracy of the changes by initialing the time sheet.

The time sheets serve an additional and equally important function. They are the record the Employer Record uses to bill the various agencies for the time worked on the various programs and projects. They serve as the justification for the amounts on the individual invoices.

The time sheets are important for an independent auditor. Each year employers receiving federal funds are required to have an independent audit of all accounting records and of the various programs which receive federal moneys. The hours worked as recorded on the time sheets are traced back to the financial records.
For Rogue Institute, Employer of Record for the Ecosystem Workforce Training Program in the Rogue Valley, time sheets will cover the 26th to the 10th and the 11th to the 25th of each month. Time sheets are due to be turned in to the Administrative Coordinator on the 28th and 13th of the month. The Administrative Coordinator will verify the accuracy of the time sheets and forward them to the Executive Director for review and signature. The Executive Director will return the time sheets to the Administrative Coordinator who will enter the hours worked into the Excel payroll spreadsheet for calculation of net pay and the calculation of how the payroll is to be spread to the various programs. This spreadsheet is then used to input the payroll information into the Peachtree Accounting System and checks are prepared.

**PAY DAYS**

All employees are paid on the 15th and last day of each month. Each paycheck will include earnings for all work performed through the end of the previous payroll period.

In the event that a regularly scheduled payday falls on a day off such as a weekend or holiday, employees will receive pay on the last day of work before the regularly scheduled payday.

**EXPENSE SHEETS**

Each employee is reimbursed for any approved business expense incurred on behalf of RIEE. The most typical expense is mileage expense for the use of the employee’s private vehicle in work related travel. This will be reimbursed based on an amount per mile as determined by the Executive Director. Thus it is important that each employee keep an accurate record of the mileage driven in work related travel. The expense sheets are used by RIEE much the same as time sheets are and are equally important.

The expense sheets will cover from the 26th of one month to the 25th of the next month and are due to be turned in to the Administrative Coordinator on the 28th of the month. The supervisor will review and then initial each expense sheet before submitting them to the Administrative Coordinator. An example of an expense sheet is included in Appendix S.

**PURCHASING**

The requests for all checks for purchasing supplies, as well as purchases made on open accounts, shall be made in writing to the Administrative Coordinator, and shall have the following information as found on the Purchase Requisition Form:

- the amount of the check
- to whom the check should be written
- program area to be charged
- dates needed for the check to be written
- method of disbursement (e.g. mail to..., given to...)

As per directions, the Requisition Form should be attached to the Invoice. As the Administrative Coordinator cannot sign checks, sufficient lead time must be allowed to obtain authorized signatures.

Appendix T contains a copy of the requisition form used by Rogue Institute.
Receipts are needed for everything, for all money spent. The receipts should be placed in the care of the Administrative Coordinator when they are not attached to Requisition Forms. This applies to cash purchases as well as purchases made under open accounts. It is the Program Coordinators’ responsibility to administer this process within each program area.

COMMITMENTS TO SPEND

A complete record and documentation is needed for other commitments to spend. This includes lease agreements for facilities, equipment rentals, etc. Examples are office space for program outreach, vehicle agreements and rentals, agreements for use of government property, storage sheds, tools, agreements for use of consultants, etc. Again it is the responsibility of the Program Coordinator to administer these requirements within his/her program. An agreement for use of facilities is in Appendix H (Amendment); an example of an agreement to hire a consultant is in Appendix T.

INVOICE PROCEDURE - COMPLETED WORK

The steps for dealing with invoices includes computerized accounting for RIEE, using the Peachtree Accounting program, hereinafter called PT. Forest Service and BLM agreements allow for 30 days advance billing. To determine the amount to include in the Billing Invoice, follow these steps:
   a) Determine the number of crew hours in the next 30 days.
   b) Review the project schedule for the upcoming month.
   c) Determine which landowners have projects scheduled and prepare the Billing Invoice for each.

Samples of completed Forest Service and BLM invoices (billings) are in Appendix U.

Follow the steps below for tracking using Peachtree or other accounting programs.
- Create the invoice
- Make a copy, plus a copy for the Program Area files too.
- Put the accounting copy in a “to be entered into PT” folder.
- Enter into PT.
- Put invoice in unpaid invoices folder

When the check comes in:
- Remove invoice from folder, mark paid, and date.
- put in “to be entered...”
- Enter into PT.
- Put in paid invoices folder.

Adopt a Billing Follow-up procedure similar to the one shown here.
- Send a cover letter with the invoice.
- In 5 working days call the agency to determine status of billing, and when payment may be expected.
- Document the result of the conversation in unpaid invoices file.
- Within two days after payment should have been received, call again and document
ADMINISTRATIVE PROCEDURES

All administrative procedures need to be collected into a single source binder if you haven’t already done so. This way you will be able to answer all procedural question within your organization at the touch of a finger. Be aware that this collection will be amended more or less constantly as your program grows, until it reaches critical mass...

ORGANIZATIONAL STRUCTURE AND LICENSING

Rogue Institute is organized as a non-profit corporation, 501(c)3 - with a focus on education. Many of the licenses required of for-profit businesses are not required of a non-profit educational institution serving as Employer of Record. Some examples, but not all, are:
- Oregon State Farm /Forest Labor License
- Migrant & Seasonal Agricultural Worker Protection Act Registration

Many other registrations such as Employer ID Number, Unemployment Insurance coverage, Worker's Compensation, etc. are required as with any other employer. A good accountant and attorney should be retained to ensure all legal requirements are met.

INSURANCE

There are four different types of insurance that you will need: 1) worker's compensation, 2) liability, 3) health, 4) Directors & Officers.

1) Worker's Compensation Insurance: In order to operate legally, you must have worker's compensation insurance. This is the first and most important insurance to get. If you already are an operating organization, you most likely have some sort of worker's comp insurance. If you have not been doing training work before or have done little field work, you will have to make changes. Regardless, you will have dramatic increases in your costs.

Some worker's comp companies, particularly the ones that deal with small businesses, do not deal with restoration / reforestation work, so you may find that you will have to change carriers.

Typical categories that are used in the ecosystem field work include: reforestation (restoration), survey, fence building. Depending on your accident history, you can expect to spend about 35% per every dollar of payroll. This is dramatically more than office work with is less than a cent per $1 payroll.

Generally, workers comp policies are paid through a series of payments based on your payroll estimates. At the end of the year, you will have to make adjustments and pay the difference. The most important part of workers comp administration is keeping good records of when people are working, and under which workers comp category they are working. At the end of each year, you have to provide these records to the insurance company, who will adjust your payments. If you do not have good records, you will be charged the highest rate for all time that person worked. Also, good records will tell you in advance that you are spending beyond your estimates and will owe a big bill at the end of the year.

Work place safety is vital, as is obeying OSHA requirements. Get a copy of OSHA regulations for forest activities for handy reference.

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2) **Liability Insurance**: This is the insurance you get so that when someone comes into your operation and trips over the rug you are insured. It also covers situations in the workplace, such as when someone comes into where you are working and does something dumb, and then sues you. Sarcasm aside, it’s important stuff. It can also provide some protection if your people are driving their own vehicles during work time and get in a car wreck. Expect that the insurance company will ask for proof of liability insurance for all the people to whom you pay mileage. A common limit is $1,000,000 per occurrence and $5,000,000 total, but get estimates for a number of different options.

Associated with liability insurance is auto insurance for all the rigs you own. This is simply added onto your policy as you acquire vehicles. Like with personal auto insurance, they need all the basic information details about the vehicle and will not insure the vehicle if they don’t know you have it.

Also usually associated with liability insurance is property loss coverage. This is what replaces equipment, computers, desks, chain saws, etc. if they are stolen or the building burns down. What is crucial here are good estimates of the dollar amount of the equipment you own. Be sure to point out the stuff you have goes into the field. Formal inventories of equipment are invaluable here. Often, insurance agents are used to thinking about property coverage in terms of computers that sit in the offices. Finally, if you are borrowing in equipment and are responsible for its replacement if it is lost, be sure to insure it as well.

If you own the place that you work in, you will need to insure that too.

3) **Health Insurance**  
HMO’s tend to be cheaper than old fashioned insurance, and frequent providers offers better coverage for catastrophic injuries. Getting a quote takes time and lots of paperwork, so let’s get started. You will have to get each employee to fill out a form about their medical history before we can get any quotes.

Frequently, employers choose to have a waiting period, so that new employees are eligible for health insurance until several months have gone by. However, if you are dealing with seasonal workers you probably want to eliminate the waiting period. This is particularly important if you want them to be eligible for coverage after they leave the training program, because they usually have to have insurance for 6 months before they can get continued coverage.

4) **Director’s and Officer’s Insurance**  
This should be seriously considered by any non-profit organization. It protects the board of directors, (and if you choose, employees), from being sued as individuals for mistakes made by the corporation. This is a relatively specialized type of insurance. A carrier that focuses on non-profits is Gails Creek Insurance, located in Portland.

Included in this kind of insurance can be employment discrimination insurance for both the corporation and the individuals, which is vital for a trainee program.

Also, for inexperienced non-profit boards and board members, a useful publication is “A Guide to Non-profit Board Service in Oregon.” published by the Oregon Department of Justice, Susan Turley at (503) 229-5902.
General hints:

- Even if you think that you already have a type of insurance, embarking on a big new project like a training program, means that you need to go back and check to see that your insurance will cover what you will be doing.

- For each insurance type, seek out a number of quotes from a variety of insurance carriers. Each agent is able to access different markets and has different specialties. So, even though it more complicated at times, you may find you need three different insurance agents. This is particularly likely to be true if an organization is odd—a non-profit running a training program on top of 17 other different things that 'normal' businesses do not do.

- Getting insurance quotes takes longer than you think it will, so leave yourself several months lead time. This is particularly important when you are working with brokers that are not familiar with your type of organization.

- Be sure that the agent that you are working with fully understands your organization. You want to be sure that the coverage you have actually covers what you do.

- Have someone such as a skilled board member look at the policies to see if they give you the coverage you need. With several different estimates, you will be comparing apples and oranges. Different prices often mean very different products.

- If you are a non-profit organization, your board needs to have final approval over the policies that you decide to purchase. So don't forget a formal motion by the board.

STATE UNEMPLOYMENT TAXES

A retraining program has the potential to dramatically increase your unemployment taxes. A clear, aggressive strategy needs to be thought out in advance for how you will get trainees employed or self-employed as soon as possible after the program ends. Otherwise, you will see dramatic increases in your rates for the entire organization.
INDUSTRY DEVELOPMENT

Industry development is an area of the workforce training project that is often put on the back burner because of the more pressing issues of day-to-day business. The Rogue Valley steering committee has made numerous attempts to get something going, and in fact have made progress in some areas, but it just don’t seem to be enough hours in a day and enough days in a week, to follow through.

Don’t let the comments in the previous paragraph let you off the hook! This is probably one of the key components of a successful training site. Industry development is essentially the path to long-term, family-wage, employment for the trainees. Industry development includes the contracting community with the federal and state agencies, the non-traditional forest products industry, and non-traditional markets. In my mind it gets put on the back burner because it is such a huge task - it is a project in itself. Following is some discussion about what has happened to date and where things are heading.

AGENCY STEWARDSHIP

This discussion is primarily about federal agencies - state and local agencies, and private landowners will probably follow, to some extent, the lead of the federal agencies.

Stewardship has had various meanings over time. A few years ago some agency locations had a type of stewardship that related primarily to reforestation functions. As an example, a contractor would be selected, based on their successful proposal for completing the work, to prepare the site for planting, plant the site, deal with any animal damage or brush competition, survey for survival, and finally certify that the area was free to grow at 4 1/2 feet tall. This was a fairly complex contract compared to a standard planting contract or survival survey contract, but it still used the traditional skills that reforestation workers possessed.

The current version of stewardship (watershed restoration) is more complex and what it even means, at this point, is still up for debate. Under current thinking a stewardship project might include the initial assessment, preparing a plan of action including environmental documents, getting agency approval of the plan, implementing the plan, and monitoring the results; or it could consists of simply “bundling” a wide variety of projects into one contract after the agency has done the assessment, planning, and environmental documents. An example of bundling might be including all the reforestation (upland) work in a given area (drainage?), as well as fisheries enhancement, streambank restoration, erosion control, recreation construction, road maintenance, wildlife enhancement, fuel treatment, and various assessments or monitoring, in that area.

Today’s stewardship (watershed restoration) has more goals in mind than just accomplishing the work involved - restoring the health of watersheds, improving the social and economic conditions of timber dependent communities, promoting watershed based management, and improving partnerships with local communities. The goals in the previous sentence were taken from a May 3, 1996 letter of direction to a field by the Forest Service and BLM in Oregon, Washington, and California. It is recommended you read all the letters contained in Appendix B. Because of the wide array of skills needed to complete a project in the future, you can see why it is important to provide for a skilled workforce now, as we are doing.
The Rogue Valley training site is currently working with the Rogue River and Siskiyou National Forests to put together stewardship projects that would demonstrate both bundling and more complete types of stewardship. In addition to being used as training work for our trainees, we hope to demonstrate to agency personnel and others how stewardship will work and what boundaries to place on it. Portions of these sites will also be used by contractors as training for trainees that decide to register in the apprenticeship program - more about that later. As you can see, part of industry development is to help/facilitate the agencies carrying out their direction.

CONTRACTOR OUTREACH

One of the most important elements of industry development is the contracting community. They will be the group that hires our trainees for the time being; they will be the group that carries out the apprenticeship program; and they will be part of the group that performs stewardship contracts of the future. They are also the hardest group to get together in one place at one time, due to the nature of their work. We held a contractor dinner last December (1995) - a free meal to them in pleasant surroundings - to introduce them to the group of trainees. We invited upwards of 25 local contractors; 5 showed up. Getting in touch with them proved to be a major undertaking. From that we learned we need to go back to the drawing board and refigure our outreach strategy. By-the-way, the contractors at the dinner were very interested in graduates of the training and, in most cases, have maintained contact with us and/or hired graduates, so we know the interest is there - we just need to improve our outreach. Some suggestions are for trainees to visit the contractor at their worksite or office during the workday, invite contractors to our worksites as they drive through the area, and invite contractors to be instructors or participate in education days. A labor/industry meeting was held in August, 1996 that included people from the Rogue Valley steering committee, LERC, the Forest Service, and Rogue Institute staff. Contractor outreach was a major item of discussion, with the focus on trainee placement/industry development. As a result of that meeting, a grant was requested from Oregon Economic Development Department to hire a person to work with the contractor community in job placement and industry development. Status of that grant is unknown at this writing.

APPRENTICESHIP

The EWTP training sites are part of a formal apprenticeship system that is endorsed by the Oregon Bureau of Labor and Industries. This program is managed by the Ecosystem Management Joint Apprenticeship and Training Committee (JATC) and is composed of two major components.

For people in the training programs there is an opportunity to earn a title of Forest Technician upon the completion of 1,000 hours of on-the-job training and 200 hours of classroom work. The training requirements are outlined in a set of trainee standards approved by the Oregon State Apprenticeship and Training Council. The standards are included in Appendix V.
Once a person graduates from the training program and secures work with an employer who is involved in some sort of ecosystem work there exists an opportunity to continue receiving credit for their on-the-job training through the Ecosystem Management apprenticeship program. This is a program consisting of 4,000 hours of on-the-job training and approximately 288 hours of classroom work. Completion of this requirement awards a journeyman certificate as an Ecosystem Management Specialist. It is expected that this apprenticeship program will take approximately 3 years to complete due to the seasonal nature of most jobs, but completion of the program will provide a valuable and industry recognized certificate attesting to a person’s training level and commitment to the industry.

As with all apprenticeship programs there is a graduated wage scale that currently starts at 80% of the journeyman wage and progresses to 100% as a person advances in the program. Wages are often driven by the Service Contract Act on federal forest work but are currently set at $11.00 per hour on private land work.

Every person who chooses to enroll as an apprentice in the Ecosystem Management program or as a trainee in the Forest Technician program can apply to receive credit for their previous experience. The JATC is very willing to review any applications from any applicant and is willing to award credit in the program to anyone who merits it. There are several criteria that drive the decision on credit. The applicant must document how they meet the work processes as spelled out in the standards: show their experience and where they got it. This experience must be verified by someone else, whenever possible.

This is an industry that seems to be on the verge of providing a large number of long term jobs to people. The JATC is recruiting employers who are interested in pursuing economic opportunities in the ecosystem management field. Hopefully in the near future a job broker will be established to help graduates find employment with employers and to act as a clearing house for access to contracts for potential entrepreneurs in the industry.

**ENTREPRENEURIAL DEVELOPMENT**

An assumption throughout the training at the Rogue Valley site, and elsewhere, has been that graduates of the Ecosystem Workforce Training program would not depend entirely on wages for their total income, but would learn entrepreneurial techniques to glean by-products of their management work as additional sources of income. This would result in their bids for project work being competitively low than more traditional contractors who bid the job without consideration for other opportunities.

In a recent conversation with agency people at the regional level, it was learned that this is an area where they would like us to focus. The reason for this is not declining federal budgets, but an increasing demand for expensive management techniques such as density management. Entrepreneurial development, similar to industry development, has often gotten lost in the shuffle of everyday work, BUT we need to wake up. The handwriting has been on the wall, now the agency folks are speaking.
We at Rogue Valley attempted, last year, to develop a project that had lots of opportunities, but lack of staff to follow up doomed it to less than successful completion. Business training came late in the year. Contract training was not of high quality, but as with other areas of the program, we saw the problem and came up with solutions.

- Business and entrepreneurial training will start the first part of September and continue for twelve weeks. All trainees will receive the first six weeks or so. At the mid point, the trainees will self-select (with input from instructors) whether they will continue the curriculum to business owner, or whether they will follow the employee route that helps them learn job-seeking skills.

- Contract training is being presented from a number of prospectives - GCAP, agency Contracting Officers and Inspectors, and contractors. They are learning skills that will qualify them to be a contract inspector for a contractor. They are learning which products they can get salvage rights to and how to go about it.

- The trainees will be involved in a demonstration project where they remove small diameter logs from a project site with low impact, low cost yarding equipment, then mill it using recently developed equipment designed for logs 10 inch diameter and less. Marketing the material has been the key to success in other demonstrations of this sort.

- We plan to accomplish some precommercial thinning at a time when trainees can take advantage of the holiday bough and tree market.

- The education coordinator will bring in people who will talk about value-added products. The crew supervisors will discuss possibilities at each job site.

- Trainees will prepare mock bids on each project they work on and monitor expenses and time used to see how accurate their bids are.

To reiterate, industry development includes all of the areas discussed above - agency stewardship, contractor outreach, apprenticeship, and entrepreneurial development. If one of those links is overlooked, success for the trainees is in jeopardy. It is paramount to focus on all areas.
PROJECT EVALUATION

Progress forward means you have to look at where you have been and if you were successful in accomplishing what you planned. For most this process is called evaluation or critique. Project evaluation has been divided into Agency, Trainee, Staff, and Regional. In some instances such as Trainee, the evaluation is "by" and "to". In others, such as Agency, the formal evaluation is "by", but there is often an informal "to". Please read on.

AGENCY

This evaluation, in many ways, is one of the most important evaluations you receive. The landowner is the source of income to support the work portion of the program - if you don't have that support, you won't have trainees working to gain experience. We found that the landowner's feedback on how we did was very valuable in changing the way we did things this year. It also gives us another chance to approach them about future projects. A copy of our project evaluation form is first in Appendix W.

TRAINEE

The trainee is another valuable source of what is really happening in the program. From them you learn of personal conflicts on the crew, education they like or don't like, when they have had enough of a project, etc. They complete a daily diary of events from their prospective and turn that in to the supervisor. All supervisors use that as a means of determining where they need to focus their energy on the worksite, changes needed in the program, and special needs that people aren't able to voice. Copies in English and Spanish are the second and third documents in Appendix W.

STAFF

The remaining evaluation forms in Appendix W are prepared by the crew supervisor. The first is the crew supervisor daily notes and is a daily diary of events on the ground, including observations about individual trainees. The next form is a formal evaluation of the trainee, done weekly for the first few weeks, and monitors their progress in meeting the weekly checkpoints. The next two forms are formal notices, one for deficiencies on the job, and one for dismissal. The last document in Appendix W is a summary document of a previous dislocated timber worker training evaluation that was used extensively in developing second year guidelines for the Rogue Valley site.

REGIONAL EVALUATIONS

Regional evaluations cover the entire workforce training project or may be local evaluations prepared for regional use. They are usually prepared from data presented by each demo site. They are very useful for helping individual demo sites avoid pitfalls experienced previously and seeing how you fit into the big picture. Some examples are included in Appendix A, as well as in Appendix X.
WHERE TO FROM HERE - THE FUTURE

The future for the trainees and the Ecosystem Workforce Training Project looks bright, and at the same time dismal, according to who you talk with.

Agency coordinators for the Jobs-in-the-Woods program see a bright future. They see dislocated timber workers working and receiving the training envisioned in President Clinton’s Northwest Economic Initiative; they see some rough bumps in getting their respective agencies to get over some of the contracting hurdles, but they see it happening; they see a social improvement for folks in the rural, timber dependent, communities; they see this training program as a success and one that will go on into the future after Jobs-in-the-Woods dollars are gone.

People working in each of the training sites around the Northwest share a similar vision, in varying degrees, depending on their success with their local partners. These people are the key to success of the program in many instances. They are the folks that keep pushing the agencies to reform contracting policy; that encourage trainees and local communities to keep pushing toward success and independence; that put in long hours to make it a go.

Then there are the landowner project managers, often from federal agencies, some of who are avid supporters no matter what, and have kept this program going the past three years; as well as some who are not so avid and see this program going away when the Jobs-in-the-Woods money goes away. Of the more vocal individuals, the supporters outweigh the not so supporters. The big issue has been cost and production, no matter how often we say “but this is a training program and sure it is going to cost more and be less productive”. From this aspect the future of the program somewhat rests on how entrepreneurial we training site steering committees can be. Another aspect is that high level agency coordinators are working hard to promote the social attributes of the training as a benefit to the agency, along with lower costs and high productivity that they would normally see in forest contract work. Federal and private landowners are seeing a decrease in budgets and people to do the work internally, and naturally are looking for the biggest bang for their buck. It is incumbent on us to look for ways to be more effective and less costly to them, BUT still maintain the quality of the training and work related to the training. In a nutshell, as long as we continue to improve and excel as we have the past three years, this training program will continue.

THE TRAINEES

After completing the first season of classroom and field work training, the graduates of the EWTP have a number of options. A graphic version of the options is on page 3 of this manual. It is clear to us that the training program often clarifies a person’s goals and they are able to then pursue a course of action successfully.
APPRENTICESHIP - ECOSYSTEM MANAGEMENT JATC

(A complete description of the Ecosystem Management JATC apprenticeship is located in the Industrial Development section under Apprenticeship.)

This apprenticeship has been established for graduates of the EWTP, has training agents available wihere being recruited, and is ready to proceed. It consists of a second and third year of work for a registered contractor, who has agreed to continue the trainee's formal education. The trainees will experience work in the contracting world, and may begin to specialize a little more in types of ecosystem work. This will prepare them to either become a contractor or continue working as managers for a contractor. In some cases, individuals might continue working as laborers for contractors.

As with all apprenticeships the apprentice is working for a wage that is 80% of the prevailing wage during apprenticeship, and is eligible to go to full wage upon satisfactory completion of the apprenticeship. They will receive state certification and be issued a journey license at satisfactory completion.

COLLEGE - FOREST TECHNICIAN OR BACHELOR OF SCIENCE

The trainee may choose to graduate from the EWTP and continue their studies at a college for either a two year technical degree or a four year graduate degree. Most people making this choice have decided to pursue the more technical/professional work in ecosystem management becoming, or working for consulting contractors doing assessment and prescription of treatment for land owners. Two of our 1995 graduates went this route both in wildlife and fisheries management.

JOURNEYMAN

A third option that often occurs for a person graduating from the EWTP is that they become eligible for the journey level as a result of the additional education and work experience they receive. They then move right into a higher level position with a contractor or start up/continue contracting themselves. The 1995 graduates of the Rogue Valley EWTP, one went on to work for a number of contractors, either as contract inspector, or as a forestry technician; two continued with a contracting business they had previously, only on a higher plain; and five formed a contracting partnership and are actively bidding receiving contracts on private and public lands.

PRIVATE ENTERPRISE

The final option is the entrepreneur. This person might be a contractor, or might be manufacturing or marketing products made from ecosystem management by-products, or they might be providing a service to folks in the ecosystem management field. A lot of the education and some of the field work exposes trainees to that aspect of the work world as well as to the contacts that may help them out later.

Any one of the four routes chosen ends up at the same point - the trainee has either become a valuable employee for an employer, or has become an employer who is hiring valuable employees.
THE INDUSTRY

Industry development is moving ahead rapidly. Many efforts are happening simultaneously that will assure the industry is there for people graduating from the EWTP. Some examples: Sweet Home Ranger District, Illinois Valley Ranger District, and the Rogue River National Forest are three sites where stewardship (bundled) projects are being formulated in response to regional/national direction of the Forest Service and BLM; a contractor outreach and trainee graduate marketing position is planned to join the contracting community and the EWTP in this effort; the federal agencies are continuing in their efforts to reduce barriers to small contractors from rural timber dependent communities who want to contract in their community; more community partners are being encouraged to participate in the steering committees as well as in the training program; and private landowners, watershed councils, and municipalities are being solicited for projects for the work training to broaden the base of potential work sites for graduates in the future.

The Natural Resource Partnership, made up of the states of Oregon, Washington, and California, promises to increase the potential for ecosystem management work in the rural communities. It is still in the formulation stage but certainly looks promising for the future of the industry.

CONCLUSION

I don’t see this version of the manual as the final version. Situations are constantly changing, we are learning new areas of improvement daily, the political scene is moving rapidly, and new ideas are surfacing frequently. I see this manual as the beginning. Once you have finished reading it, I’m sure you will have an idea or improvement that needs to be included to make it complete, or you will see an error in information that needs to be corrected, so I ask that you contact me by mail, phone, or E-mail. It is my intention to have three or four people work with me (in their spare time?!) to improve on this first edition, to include more information from other training sites, and to keep up with the changes in the industry. Happy training!!

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