



BRBCH Project Leader Training Guide

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	Document Owner	Checked and Released by		
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Date				
Signature				



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1. PURPOSE

The purpose of this training guide is to provide a set of instructions to improve the quality of a task, process, or job. The ultimate goal is to provide a BCH Project Leader with the tools and information that the Project Leader needs to excel at leading a project. This document will also cover how to fill out needed forms, identify trail safety requirements/hazards, and identify the array of skills needed to successfully execute and complete a project. This guide will also go over the requirements to become a BCH Project Leader.

This guide was developed by the committee consisting of Christy Schram-Duggan, Ed Duggan, Jan Bullock, Joe Kirkland, Bonnie Morgan, Kathy Stroppel-Holl, and Dan Brandborg, with additional suggestions from the project workshop attendees.

To take the BCH mission and apply it to the BCH Project Leader Training Guide

2. BCH MISSION

The purpose of BCH shall be:

- To perpetuate the commonsense use and enjoyment of horses in America's backcountry and wilderness.
- To work to ensure that public lands remain open to recreational stock use.
- To assist the various government, state, and private agencies in their maintenance and management of said resource.
- To educate, encourage, and solicit active participation in the wise and sustaining use of the back country resource by horsemen and the general public commensurate with our heritage.
- To foster and encourage the formation of new state Back Country Horsemen's organizations.

3. SCOPE

This Project Leader Training Guide applies to the Back Country Horsemen Project Leaders and/or Back Country Horsemen Report Chair that create and maintain project reports and gather data for the local BCH chapter, State BCHMT, and Back Country Horsemen of America (BCHA). This guide also applies to the Back Country Horsemen Project Chair for the local chapter of BCH.

4. PROJECT LEADER ROLE AND RESPONSIBILITIES

4.1 Role

- Select, develop, and implement the scope of the project.
- Delegate tasks to project members.
- Motivate the team to achieve the completion of the project in a safe manner.
- Identify necessary people (i.e., certified sawyer(s), co-lead, food coordinator, Communication Officer (CO), and Safety Officer (SO) who are on the project.
- Identify necessary forms and reports.



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4.2 Responsibilities

- Ensure the project is completed with safety in mind for the people, stock, and general public.
- Communicate with the team, BCH chapter, local Forest Service (FS), and any other applicable agencies.
- Ensure all appropriate team members are current with their certifications.
- Ensure all equipment, including safety and communication devices, is available and in good working condition, documented, and returned upon project completion.
- Ensure all forms and reports are completed and turned in to the Report Chair promptly.
- Makes the final decision on the Go/No Go of the project.

5. PROJECT ACTION PLAN

5.1 Preparation in December - February

- Identify who wants to be a Project Co-Leader
- Notify the Project Committee Chair / BCH chapter Board
- Project Committee Chair meets with BNF to discuss the project
- Finalize the date and if this is a day trip or an overnight trip
- Obtain communication device training if needed (radio, Spot Device, and/or Garmin InReach)
- Project Committee set up and provides the sign-up roster for each project at the March, April, and May General Meetings, including a summary of each project by the Project Leader

5.2 Plan

- Start developing the timeline after the sign-up roster is available for a specific project.
- Two months before the project date - Contact Training Chair to verify team member's certifications
 - Identify what skill sets are on your team
- Two months before the project date - Contact project team members and assign roles
 - Project Co-Leader:
 - Assists with paperwork, coordination of the project, and is second in command
 - Food Coordinator:
 - If the day trip coordinates the trailhead Rest & Recovery
 - If overnight, preps food, works with or is camp cook, and coordinates trailhead Rest & Recovery
 - Safety Officer (SO):
 - Situational Awareness
 - One or more team members can be SO
 - If split into two work groups, each group must have an SO
 - Communications Officer (CO)
 - One or more team members can be CO
 - If split into two work groups, each group must have a CO
 - BNF Radio



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- BCH Radios
 - Garmin InReach
 - Spot
 - Outside Point of Contact (OPOC)
 - One or more BCH members can be OPOC
 - Camp Cook:
 - If overnight, cooks all meals at base camp, if designated.
- One month before the project date - Meet with the Project Co-Leader and discuss the following:
 - Any roles that need to be filled
 - Tools needed for the project: i.e., crosscut, chainsaw & PPE, handsaws, loppers, pulaski, etc.
 - Survey the project members, who are bringing their tools.
 - How many riders, hikers, and pack stock are coming
 - Can only have so many heartbeats on the trail, check with local FS
 - Dogs
 - Day trips – not allowed
 - Overnight trips – Project Leader discretion
 - Select the start times for the following:
 - To arrive at the trailhead
 - Tailgate safety talk
 - Trailhead departure
 - If there are hikers, what time do they leave
 - Select end times for the following:
 - If day trip, time to be back at the trailhead
 - If overnight trip, time to be back at base camp and estimated time back to the trailhead
 - If overnight trip, choose the general location of the base camp
 - Location of water source (200' from stock and 100' from camp, if possible)
 - Discuss the human waste procedure
 - The place for a Highline(s) and grazing for stock
 - Chose a backup base camp
 - Discuss feed for stock
 - Get familiarized with the Chuck Wagon (Cook Trailer)
 - If overnight at the trailhead and using a cook trailer, who brings it (potential locations are East Fork, Como horse camp, Larry Creek, and Boulder Creek)
 - Contact team members to go over any questions or if new folks sign up
 - Check for food allergies and let Food Coordinator and Camp Cook know if any
 - Make a phone call or text



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- If overnight trip, keep gear (tent, sleeping bag, chair, duffle) at 25 lb/person; duffle bags are preferred for packing
- Reports
 - Who will gather information for the reports (i.e., mileage, signatures, stock, hikers,)
 - Who will complete the reports and submit them to the Report Chair

5.3 Execute

- Two weeks before the project date
 - Contact Team members to confirm who is going on the project
 - Make a phone call or text
 - Check the Chuck Wagon for conditions and supplies
 - Verify Food Coordinator has a menu and if they need any assistance
 - Give the final number of people for menu preparation
 - Any food allergies, etc
 - Meet with Project Co-Leader to finalize any details
 - Does the scope of the project need to be re-evaluated based on recon?
 - Did the BNF give additional requests?
 - Has any other group worked on this project area?
 - If overnight, do you have enough pack stock for the project
 - If so, who has stock, and how many
 - Ratio: Pack stock / Number of people
- One week before the project date
 - Gather all tools that are needed and their condition
 - Located at the BR BCH Shed at the West Gate at the Fairgrounds, the third building from the gate
 - Key access, Mon – Fri, Fairground office
 - Crosscut, chainsaw, loppers, pulaskis, shovels, radio, spot device, Garmin InReach, First Aid kits, camp kitchen, etc.
 - Determine the number of pack boxes, panniers, and manties needed
 - If taking out of the Tool Shed, check out the equipment on the sign-out sheet.
 - Print all forms that are needed
 - Email, call, and/or text the project team reminders
 - Go over the PPE requirements
 - Confirm with Food Coordinator the food prep is completed
 - If not, do they need any assistance
- 48 hours before the project date
 - Go/No Go
 - Is there any Stage Fire 2 Restrictions?
 - Is any severe weather expected?
 - If No Go, contact the Project Chair and President to discuss



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- Project Chair and President notify the Board
 - Contact the FS
 - Contact the BNF Dispatch
 - Email FS contact the following information:
 - Who to contact via Garmin InReach, cell number
 - Communicate at Start time and End Time Each Day
 - Contact with Project Co-Leader to review and wrap up any details
 - Have all tools required for the project
 - Are they in good working condition?
- Day of Project
 - Project Leader and/or Project Co-Leader gather the following information:
 - Mileage and odometer reading(s)
 - How many riding stock and pack stock?
 - Did anyone carpool?
 - Did anyone pull a trailer?
 - Have team members sign in
 - Update this daily if this is a multi-day project and not all attendees are there for the full project
 - Complete Tail Gate Safety at a location designated by the Project Leader
 - Go over the following:
 - RA & Situational Awareness
 - Does everyone have water? If need more water on the trail, do you have a water filter?
 - Discuss who is carrying the BCH First Aid kit. Does anyone have their own First Aid kit?
 - Health Conditions
 - Discuss who are SO, CO, and OPOC
 - No one leaves the project without a buddy, 2 people minimum per team
 - “no man left behind / Sweep Rider or Hiker”
 - Accountability
 - PPE at all times
 - Safety is always considered overproduction
 - The stock and people’s safety is always the most important
 - Discuss the scope and plan of the project
 - Start and stop times
 - Where base camp is if overnight
 - Answer any questions that come up
- Project Begins
 - Project Members complete the scope and plan of said project



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- Project Leader designates who is the “Sweep Rider or Sweep Hiker” of all group members
- Project Completion and back at Trailhead
 - Is everyone accounted for?
 - Is all equipment accounted for?
 - The food Coordinator executes the Rest & Recovery
 - Before everyone leaves have a quick chat about the project debrief
 - Any future issues (any issues that require FS to address)

5.4 Wrap-Up

- All tools, communication devices, and the project leader training binder should be signed back in the BRBCH Shed, cleaned, and repaired.
- Collect all the tools/equipment and drop them off at the tool shed at the Fairgrounds, West Gate
 - Return the equipment within 2 days after the project.
 - Return the equipment to the Tool Shed and sign back in on the sign-out sheet.
- Gather all the data/paperwork to complete the Project Leader Report
 - Must complete all the paperwork and email them to the Report Chair within 1 week of the project completion.
 - If any tool or equipment is damaged contact the POC for the BR BCH Shed

6. FOOD COORDINATOR & CAMP COOK

6.1 Type of Project & Number of Days

- Trailhead or pack trip determines how food is stored & kitchen/cooking gear to bring
- Can have larger coolers & ice and cook trailer at trailhead camps (i.e., East Fork)
- Determine the number of meals

6.2 Number of Project Members & Any Food Issues

- The number of participants determines the quantities
- Make/bring ~5% over and bring an easy filler like peanut butter
- Food allergies: nuts, gluten, lactose (WOW butter is peanut-free and similar to PB)
- Vegetarians: no-meat meals
- Vegans don't use any products from animals and may need to bring their food
- Food dislikes: onion, garlic, cilantro, etc. – those folks may need their food if too fussy

6.3 Develop Menu

- Use most perishable food in the first dinner & breakfast
- Make what you like and keep it easy
- In the examples below, quantities feed 9
- Packed Breakfast 1: Breakfast burritos (12-15), breakfast bread (banana, squash)

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- Packed Breakfast 2: Oatmeal (4 cups, unless using packaged style, then 2 packages/person) & dried fruit, coffee cake
- Trailhead Breakfast 1: Egg, sausage, cheese scramble, muffins, melon
- Packed or TH Lunch: Meat & cheese wraps (bread squishes), trail mix, fruit gummies, cookies; goes in saddlebags or tied-on sack
- Packed Dinner: Chili (3 lbs), pre-made cornbread, fresh carrots & snap peas, instant vanilla pudding (2 pkgs) & vanilla wafers
- TH Dinner: Roasted chicken (3 lbs), pasta primavera, salad & dressing, pound cake w/ berries & whip cream
- Snacks: Chips, fresh fruit & veggies, jerky, salsa, dip, trail mix, fruit gummies, cheese, crackers
- Beverages: Coffee, tea, cocoa, electrolyte mix for water

6.4 Food Preparation & Storage

- Check the cook trailer for supplies and plastic bin (for meetings) for coffee/creamer/sugar/tea
- Develop a shopping list; include seasonings, foil, paper towels, wipes, trash bags, and ziplock (qt & gal) if not in stock in the cook trailer or plastic bin
- Pre-cook foods such as bacon, sausage, etc. then freeze
- Make meals ahead such as breakfast burritos, chili, spaghetti sauce, and roasted chicken, then freeze flat
- Repackage boxed, canned, or glass jar foods into ziplock or plastic containers
- Freeze as much as possible, serves as an ice
- Pack boxes, panniers, and coolers with individuals, and some are in BR BCH shed; packed with food, camp kitchen, & supplies weigh ~70-80 lbs total (excluding kitchen tarp weight)
- Use bear-resistant pack boxes if available
- Use the coffee pot to pack items, and put dishtowels around pots to reduce rattle/shifting

6.5 Kitchen Gear, Set Up, Pack Out

- Gear: camp water filter system, rolled table, Coleman 2-burner with propane bottles, backpacking stove, nesting pots, 20-cup coffee pot, knife, cutting board, large bowl, tongs, whisk (for pudding), large spoons, paper towels, kitchen towel, biodegradable dish soap, washcloth/sponge, matches, trashbag(s), butter, salt, pepper, sugar, creamer
- If packing in, folks bring their plate, cup, utensils
- At Trail Head, provide paper plates, cups, utensils
- Set up camp water filter system, overhead tarp, and rolled table; can use pack boxes as tables
- Hang food as necessary in bear country
- Repack boxes/panniers similar to packing them, reweigh; check grounds, and leave no trace

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7. REPORTS/FORMS

7.1 Mileage and Sign-in



BRBCH Project Sign-In & Mileage

Project Name: _____ Project Date: _____

Project Leader(s): _____

Please Print Full Name	Drove Y/N	Trailer Y/N	Walk Ride?	Number of Stock	Odometer Reading

- Completed at the trailhead by the Project Leader or Co-Project Leader.
- Each project needs this form to confirm the number of stock, mileage, and what Project Members participated in.
- If carpooled, write the address where you met to carpool at.
- Write down the odometer reading of what that vehicle is at the trailhead
 - Report Chair will calculate the mileage based on that information
- Give the form to the Report Chair within 1 week of project completion

7.2 Tailgate Safety Form

04-6170-2

TAILGATE SAFETY SESSION NOTES WEST FORK RANGER DISTRICT BITTERROOT NATIONAL FOREST

Date of Safety Briefing: _____.

PROJECT: _____
JOB HAZARD ANALYSIS ON FILE? YES NO UPDATED

Crew Leader: _____ . Person giving briefing: _____.

Attendees: _____

- Each Project needs this form to be completed before the Trailgate Safety Talk starts
- Gives the Project Leader(s) a reference for the Safety Talk
- Give form to the Report Chair within 1 week of project completion



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7.3 301b – Volunteer Service Agreement Sign-in Form

- This form will be provided by the BCH of MT in April of each year
- The Report Chair will keep the master sign-in Form
- The majority of the members will be signing this form at the April and May BCH General Meetings
- BCH members only need to sign this form once per year
- Report Chair will have a list of folks that have signed that will be posted on the Training page on the Bitter Root BCH website

7.4 RA – Risk Analysis from the Forest Service

- The RA is issued every year by the FS
- The District Ranger must sign them before the BCH chapter can get a copy
- The Report Chair will keep the master RAs
- The majority of the members will be signing the RAs at the April and May BCH General Meetings
- BCH members only need to sign this form once per year
- Report Chair will have a list of folks that have signed that will be posted on the Training page on the Bitter Root BCH website

7.5 Project Leader Report

Bitter Root Back Country Horsemen
PROJECT REPORT

Revised Feb 2017

Project Leader
 Project Location
 Project Date(s)

Project District
Stevi, Darby, Sula, W Fork, ...
 Project Agency
USFS, BLM, FWP, DNRC, ...

Work Hours				Miles		Work Completed			Community Service			
Basic Work	Skilled Work	Admin Work	Recon Work	Trail Miles	Wilderness Miles	Bars Cleared	Trees Cleared			Educ & LNT	Public Mtgs	Admin Svc
							<8"	8" - 24"	>24"			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PARTICIPANT NAME

<input style="width: 250px; height: 15px;" type="text"/>
<input style="width: 250px; height: 15px;" type="text"/>
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Equipment		Travel Time/Miles		Stock Use		
Power Equip	Heavy Equip	Travel Time	Vehicle Miles	Stock Hauling	Stock Used	Stock Days
<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>

PROJECT NOTES

<input style="width: 350px; height: 15px;" type="text"/>
<input style="width: 350px; height: 15px;" type="text"/>
<input style="width: 350px; height: 15px;" type="text"/>

PROJECT EXPENSES		Donated (Yes/No)	Value
Item			
<input style="width: 150px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	<input style="width: 50px; height: 15px;" type="text"/>	\$ <input style="width: 50px; height: 15px;" type="text"/>
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- Fill in the following at the top of the form
 - *Project Leader*: Write the Project Leader(s) names here
 - *Project Location*: Write the name of the project here
 - *Project Date(s)*: Write in the dates of the project
 - *Project District*: Write in the Forest District the project is located in
 - Stevi, Darby, Sula, or W. Fork
 - *Project Agency*: What agency the project is in?
 - USFS, BLM, FWP, or DNRC
- Project Data Section A
 - Work Hours section, total hours
 - *Basic Work*: riding, hiking, etc.
 - *Skilled Work*: Chainsawing, Crosscut, packing, trail maintenance
 - *Admin Work*: Paperwork, meetings
 - *Recon Work*: scoping out the project location
 - Miles
 - *Trail Miles*: Total Trail miles
 - *Wilderness Miles*: Total Wilderness Miles
 - Work Completed
 - *Bars Cleared*: How many water bars were cleared and/or reestablished, or created
 - *Trees Cleared*: Total number of trees cleared by size
 - <8": Trees less than 8 inches in diameter
 - 8"-24": Trees 8 inches to 24 inches in diameter
 - >24": Trees greater than 24 inches in diameter
 - *Community Service*: Total hours
 - *Education & Leave No Trace*: Talking to the public
 - *Public Meetings*: Going to a public meeting
 - *Administrative Services*: Notices to the newspaper, Social Media, etc
- Project Data Section B
 - Equipment, total hours
 - *Power Equipment*: Chainsaws,
 - *Heavy Equipment*: Skid Steer, etc.
 - Travel Time/Miles
 - *Travel Time*: Total traveled time in hours
 - *Vehicle Miles*: Total traveled vehicle miles (all vehicles)
 - *Stock Hauling Miles*: Total traveled miles of only the folks hauling horses and mules
 - Stock Use
 - *Stock Used*: Total amount of horses and mules
 - *Stock Days*: Take the number of stock used per day and add them together
 - Example: 6 horses/mules and the project is 3 days
 - First day - 6 horses/mules
 - Second day – 4 horses/mules
 - Third day - 6 horses/mules
 - Total Stock Days – 16 (6 + 4 +6 = 16)
- Participant Name



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- Write down all the folks that participated in the project
 - Next to the name, write if they rode, led a pack string, or hiked
- *Project Notes:*
 - Great place to do a quick summary of the project
 - Any follow-up issues that needs the FS to address
- *Project Expenses*
 - List of items that were donated or needed to be purchased to complete the project
 - *Item:* Write the item name
 - *Donated:* Was it donated?
 - *Value:* The value of the item in \$

7.6 Report Locations – Where are the reports found?

- All of the forms on the [Bitter Root Back Country Horsemen Homepage](#)

8. DEFINITION OF TERMS, CERTIFICATIONS, AND TRAINING

8.1 Acronyms

- *BCH:* Back Country Horsemen
- *BCHA:* Back Country Horsemen of America
- *BCHMT:* Back Country Horsemen of Montana
- *BR BCH:* Bitter Root Back Country Horsemen
- *BNF:* Bitterroot National Forest
- *CO:* Communication Officer
- *FS:* Forest Service
- *FWP:* Fish, Wildlife, and Parks
- *OPOC:* Outside Point of Contact
- *PPE:* Personal Protection Equipment
- *RA:* Risk Analysis
- *SO:* Safety Officer

8.2 Project Terms

- *Base Camp:* The location where the project members return each evening for shelter, and where food and general supplies are kept.
- *Brushers:* Project members who remove brush, saplings, and tree limbs to open the trail corridor to proper clearing limits for a given trail.
- *Bucking:* Cutting a felled tree into sections or logs.
- *Camp Cook(s):* Coordinates all meals at base camp with Project Team Members assisting.
- *Communications Officer(s):* Carries the radio and/or Garmin on the project.
- *Food Coordinator(s):* Coordinates and preps the food needed for the BCH project.
- *Go/No Go:* To determine if trail workers should proceed with a project or walk away to ensure their safety.



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- *Hikers*: A person who walks on the trail.
- *Outside Point of Contact*: A person at home that is monitoring the Garmin InReach and website to track the project team members, if needed.
- *Packers*: A person who handles the pack stock and a pack string.
- *Packstock*: Horses and/or mules carrying gear, supplies, and tools for trail users or workers, and loaded with packing equipment such as panniers, pack boxes, and/or manties.
- *Packstring*: A group of pack stock tied together in strings of 2 or more horses and/or mules.
- *Project Chair*: Coordinates the projects for each season and communicates with the local FS.
- *Project Team Member*: Members of the project
- *Project Co-Leader*: Co-leads the BCH project to completion in a safe and timely manner, second in command.
- *Project Leader*: Coordinates a BCH project to completion in a safe and timely manner.
- *Report Chair*: Gathers all the reports and data to submit to the local FS, state BCH, and BCHA.
- *Rest & Recovery*: After completion of a project, team members are given food, rehydration, and assistance in unpacking gear and handling stock back at the trailhead.
- *Riders*: A person who rides a horse or mule on the trail.
- *Risk Analysis*: A formal FS document written by a crew leader and signed annually by a District Ranger or a designee. It describes the hazards of a particular trail project and how to reduce them. A crew leader reviews this document with their crew before beginning work and each crew member signs it.
- *Safety Officer(s)*: Ensures the BCH project is completed in a safe manner and must have the First Aid Certification.
- *Sawyers*: Project members who are certified to run a chain saw or crosscut saw to cut trees and/or logs that block the use of the trail.
- *Situational Awareness*: Refers to safety concerns specific to trail projects.
- *Swampers*: Project members who physically remove the trees and/or logs after the sawyers cut those obstacles that block the use of the trail.
- *Trail Clearing*: The combination of cutting brush, tree limbs, fallen logs, and/or moving rock to clear a trail corridor that meets the clearing limits for a particular trail. To Forest Service standards, 8' wide, 4' from the center of the tread left and right, and 10' high.
- *Water Bars*: Trail drainage structure that includes a drain dip reinforced by a peeled log or row of large rocks.



BRBCH Project Leader Training Guide

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8.3 Certifications and/or Training

- *Chainsaw Certification:* Provides operators with the skills and knowledge required to safely maintain and operate a chainsaw under the FS Volunteer Agreement.
 - Chainsaw Certifications are good for 3 years
- *Crosscut Saw Certification:* Provides operators with the skills and knowledge required to safely maintain and operate a crosscut under the FS Volunteer Agreement.
 - Crosscut Certifications are good for 3 years
- *Defensive Horsemanship:* Any person who wishes to work on trail projects with their horse needs to complete the course. Defensive Horsemanship is not required for chapter rides nor for working on a project if not around or handling horses.
 - Defensive Horsemanship cards are good for 3 years
- *Firearm Certification:* Designated volunteer firearm user for animal, (equine) disposal.
 - Firearm Certifications are good for 3 years
- *First Aid / CPR Certification:* This certification is required for those hoping to earn the chainsaw or crosscut saw certification. At least one BCH member with current First Aid/CPR Certification is needed per work project.
 - First Aid/CPR Certifications are good for 2 years

8.4 Training Records

- Training records are maintained by the BR BCH Training Chair and BR BCH members can go to the BR BCH homepage to check the status of their certifications, see the link below.
 - <https://bchmt.org/wp/bitterroot/check-your-training/>

9. REVISION HISTORY

Rev	Effective Date	Change	Modified By
1	04/07/2023	New Document	Christy Schram-Duggan