

# 2025 Team Leader Approval Process

At Tree New Mexico, we require all **team leader trainees** to complete two to three training sessions to become familiar with our specific tree-planting methods. While we recognize that many of our volunteers come with prior experience, this standardized training ensures consistency across all planting events and lays the foundation for accurate long-term data collection.

**Instructions for trainees:** Bring this form to each event you attend and have the designated trainer sign off on each completed session. Trainers may include Tree NM staff members or an appointed team leader.

## Team Leader Trainee Information:

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Phone #: \_\_\_\_\_

<p><b>1. Initial Training Session</b></p> <p><b>What the trainee will learn:</b> Tree-planting practices used by Tree NM.</p> <p>This session can be completed in one of two ways:</p> <p><b>Option A: During a Tree NM Planting Event</b> A designated trainer will guide the trainee through our planting process during one of our planting events.</p> <p><b>Option B: At a Scheduled Training Workshop</b> These workshops are offered periodically at the discretion of our Education Director.</p> <p><b><i>Trainer Verification (to be completed by the trainer)</i></b> Date: _____</p> <p>Trainer Name: _____</p> <p>Trainer Signature: _____</p>	<p><b>2. Shadowing Session</b> <i>(Required only if the trainee has not attended a Tree NM planting event before)</i></p> <p><b>What the trainee will do:</b> Shadow an experienced trainer during a planting event to observe how the process works in a neighborhood setting, including guiding volunteers to and from planting sites.</p> <p><b><i>Trainer Verification (to be completed by the trainer)</i></b> Date: _____</p> <p>Trainer Name: _____</p> <p>Trainer Signature: _____</p> <p><b>Note for trainees:</b> You may shadow at as many events as you'd like before moving on to Session 3.</p>
<p><b>3. Practice Leadership Session</b></p> <p><b>What the trainee will do:</b> Lead a planting team while being observed by a trainer. This ensures you're aligned with our standards and ready to lead independently.</p> <p><b><i>Trainer Verification (to be completed by the trainer)</i></b> Date: _____</p> <p>Trainer Name: _____</p> <p>Trainer Signature: _____</p>	<p><b>4. Final Steps</b></p> <p>Once you've done your 2–3 training sessions, congrats, you're officially a <b>Tree NM Team Leader!</b></p> <p>If you'd like a little more time, feel free to keep shadowing or co-leading with another team leader until you're feeling totally confident.</p> <p><b>Bring this form back</b> to either Carlos Gomez (Educational Director), Beth Forman (Statewide Planting Program Director), Ray Hendrix (ABQ NeighborWoods Program Director), or your Regional Coordinator and they can chat about what's next and go over your role moving forward.</p>

## CORE PRINCIPLES:

- Safety is our highest priority.
- Foster a supportive, positive environment.
- Ensure proper planting technique for tree survival.
- Maintain clear communication with coordinators and volunteers.

## AT THE STAGING AREA:

- *Wear your high-visibility safety vest!*
- Store event coordinator's contact number in your phone.
- Verify all tools are in your bucket. Also count the large items (shovels, rakes, etc).
- Identify and gather your team members.
- Verify proper attire for all volunteers:
  - Closed-toe shoes
  - Work gloves
  - Sun protection (hat, sunscreen)
  - Adequate water supply
- Establish clear meeting point at planting location.

## AT THE PLANTING SITE:

- Use provided map to confirm correct tree-to-hole assignments.
- Verify water source/hose availability.
- Contact the coordinator immediately if water access is missing.
- Safety Briefing:
  - Demonstrate proper tool handling
  - Emphasize two-person lifting for heavy items
  - Review potential hazards
  - Point out sharp tool awareness

## Tree NM Planting Team Leader Session #3- Observation Checklist

### Step #1: Prepare Tree - Did the trainee...

- Remove all tags and any tape that is or was securing the trunk to a stake and remove the stake?
- Prune any dead, damaged, crossing/rubbing branches that may have been missed in the pre-pruning?
- Remove the tree from its container?
- Remove soil from the top of the tree until you find the root flare? Sometimes these are buried deep! Don't be afraid to remove lots of soil if you need to!
- Loosen the root ball allowing the roots to spread out? Using your hand pruners and small pruning saw, cut all circling roots back to just before they begin to turn.
- Explain what they were doing as they were doing it?

### Step #2: Prepare Hole - Did the trainee...

- Explain that the hole should have already been dug and the homeowner should have added water?
- Explain that they need to cut back any weed barrier plastic or cloth at least 3 feet away from the hole?
- Explain and show how to make sure the hole is the right depth?
- Add water to make the bottom and sides of the hole wet?

### Step #3: Set Tree - Did the trainee...

- Make sure the flare of the tree's trunk is sitting just above the soil level, and use the shovel and hoe to fill in OR dig the hole deeper and wider if necessary?
- Make sure the hole is as deep as the distance from the top of the highest roots to the bottom of the root ball?
- Place tree upright in hole with roots spreading out (wagon wheel appearance) and trunk's flare just slightly ( $1/2$  to  $1''$ ) above the surface of the surrounding ground?
- Position the trunk so that the graft faces North, if there is one near the bottom of the trunk?
- Backfill in the hole ensuring that the bottom foot of the tree trunk stays as perpendicular to the ground as possible?
- Layer soil and water as they gently but firmly move the tree *back and forth and even in a circular motion*, slowly and with hose on low?
- Explain the process of seeing air bubbles come to the surface and sometimes openings appear? Explain what they are doing as they continue layering with soil and then water until soil level reaches just below the topmost roots (and where the trunk slightly flares). Explain the sense of the soil grabbing hold of the tree and pulling it into place. Once the soil level has just about covered the top roots and reached the trunk's flare, you can stop.
- Build a berm of soil around the tree (and at least 3' from the trunk) for future watering. With water on low and slow, soak the entire area.
- Spread mulch 3' to 6' deep and out to the edge of the canopy or over the berm. Smooth with rake.
- Slowly and thoroughly wet down mulch. Be sure mulch is wet down to the soil beneath. Use gloved fingers to dig down through mulch and check.
- Wiggle the tree and note that the trunk and canopy can move freely, but below the flare the root ball does not move if planted correctly. If the tree has not affixed itself to the earth in the hole, you will need to stake it.

### Step #4: Clean-up - Did the trainee...

- Restore the area - clean up excess soil, plant material, and other debris from the planting area. Rake soil smooth outside of berm and if there is small rock mulch, redistribute it evenly?
- Conduct inventory, rinse off your tools, and return them to the staging/signup area?