

Seattle Backpacking Roster Retention Policy

Seattle Backpacking Committee

Status: Approved

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Introduction

This document describes the policy for removing inactive members from the Seattle Backpacking committee roster. The policy attempts to strike a balance which keeps the rosters current while at the same time recognizing that most volunteers are long-term Mountaineers members whose level of participation varies from year to year.

The policy itself is documented in [Retention Policy Summary](#) immediately below. For many readers that is the only section they will need to read. A “catch up” policy is described in [One-Time Policies Upon Adoption Of This Policy](#) for one-time use when the policy is adopted.

The remainder of the document is intended for readers who may want to understand the rationale behind the policy. [The Committee Roster: Four Rosters in One](#) describes how a Mountaineers committee roster is really a *program* roster containing multiple groups of volunteers, each of which requires its own retention policy. [Considerations When Choosing Retention Policies](#) describes common criteria that are used to select the retention policies for each of the groups in the roster. Finally, [Determining Retention Policies](#) applies the common criteria to each of the cases for which a retention policy is needed.

Retention Policy Summary

The retention policy is summarized in the following table.

	Policy	Criteria Weighting
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			(see Considerations When Choosing Retention Policies)		
Reason For Removal	Retention Window	Notify before removing?	Accuracy (favors short window)	Perishable Skills (favors short window)	Retention & Recruiting (favors long window)
Leader Inactivity (has not led or co-led a qualifying trip - see additional notes below)	3 years	Y - must lead a qualifying trip within 1 year after notification	Medium	High	High
Instructor Inactivity	4 years	N	Low	Medium	High
Committee Member Inactivity	1 year	N	High	Low	N/A
Expired Mountaineers Membership	2 years	N	High	N/A	N/A

Notes:

1. If a person is removed due to one of the inactivity criteria, the person is first removed only from the relevant roster group. If the person is no longer a member of any roster group, the person is then removed from the Committee roster altogether.
2. Private trips do not count toward Leader Activity, even if the trip is posted on the Mountaineers website. See [Qualifying Trips for Leader Activity](#).

Qualifying Trips for Leader Activity

For purposes of retaining leader status, a *qualifying trip* is defined as a trip that is posted and led in a manner consistent with a typical Mountaineers backpack open to all members or, in the case of courses, all participants in a course. Such trips are posted with a reasonable amount of lead time, a reasonably sized registration window, and with a reasonable number of open spots. Examples of typical qualifying trips are open backpacking trips, course field trips, and trips led as part of a course. Trips that are posted with Leader Permission Required still count as open trips, provided the permission process applies equally to all members. A trip that must be cancelled due to unforeseen circumstances such as bad weather, illness, road closure, etc. still counts as a qualifying trip, provided the trip was posted in good faith as an open trip as described above.

Most **non-qualifying trips** are basically private trips that are posted in a way that prevents the general membership from participating. Examples of non-qualifying trips include trips that are posted without enough advance notice (i.e. trips whose registration period is open for only a few minutes, trips that are posted the night before departure or the morning of departure), trips that are posted with rosters that are already full, etc. This document is not making a statement one way or the other about whether posting such trips is appropriate, only that such trips do not count toward the retention period of the leader in the Leader Roster Group.

The Committee Roster: Four Rosters in One

Contrary to what its name might suggest, a program's Committee Roster serves the broader role of a *program* roster containing information about four groups of people who contribute to the program:

- **Committee Members** - People who are members of the program's committee.
- **Instructors** - People who are instructors for one or more of the program's courses.
- **Leaders** - People who are authorized to post and lead trips on behalf of the program. Membership in this group usually causes a Leader badge to be added to the person's profile and causes the website to allow them to post trips on behalf of the program.
- **Admins** - People who have administrative access to everything on the website associated with the program (roster, courses, trips, website content, etc). This is a special group that is managed proactively by committee officers. Therefore, **the Admin group is outside the scope of the policy**, and is not mentioned elsewhere in this document.

People in the committee roster can be members of any combination of these four groups. In addition, people can be included in the without any group affiliation at all, thereby allowing programs to use the roster in ad-hoc ways specific to that program, usually in combination with the "Notes" field (not shown here), which allows arbitrary text to be associated with a member's entry in the roster.

Members are assigned to these groups via a menu that looks like this:

Groups
Admins may edit the committee roster and manage courses. Leaders may schedule activities for your committee. Instructors are for your tracking purposes.

Admins
 Committee Members
 Instructors
 Leaders

Position
Choose a position if the person is part of the decision-making body of the committee. Most will probably be "Member."

Chair
Secretary
Treasurer
Member
Content Manager
Courses
Equivalency
Leadership

In addition to the membership in the four groups described above, each person in the “Committee Members” group can further be assigned a *position* in the committee, where the position is one of the predefined values shown in the screenshot above, i.e. “Chair”, “Secretary”, “Treasurer”, etc. The list includes the special value “Member”, which denotes a committee member who does not hold one of the other positions. Even though the intent of the “Position” field is to identify the members position *within the “Committee Members” group*, the website does not enforce that relationship. It’s possible to assign a Position to members who are not part of the “Committee Members” group and who indeed may not be in any group at all.

Considerations When Choosing Retention Policies

When choosing from among multiple retention policies there are competing criteria to consider.

- We want the roster to accurately reflect the current state of the program, i.e. we want the volunteers in the roster to be members who are currently active in the program. *This argues for a policy that removes inactive volunteers quickly.*
- We want a policy that welcomes volunteers back after a hiatus. Many Mountaineers members are active contributors for decades, but with lulls due to life events that may be unrelated to the Club or the outdoors (family, job, health). If a long-term member must take a year or two off to, say, focus on a career change or take care of a family member, when the member is ready to become active again we want to be sure that the member’s previous program affiliations are still there. Put another way, we don’t want long-term members to return only to find that they have been dropped from the programs for which they used to contribute. *This argues for a policy that removes inactive volunteers slowly.*

- Many of the skills required to lead trips and instruct at courses are perishable. For example, Leadership itself is a perishable skill. For some activities, the skills required to safely do the activity may also be perishable. Over time, Clubwide or programwide standards and best practices change, and the website is constantly being updated such that the details about how to set up and manage a trip sometimes change. *All of these perishable skills and knowledge argue for a policy that expires Leader and Instructor credentials after an extended period of inactivity.*

Any retention policy must balance these conflicting criteria, and will necessarily be a compromise.

Determining Retention Policies

This section describes how the retention policies were determined. It applies the criteria in [Considerations When Choosing Retention Policies](#) to each of the roster groups described in [The Committee Roster: Four Rosters in One](#). It also applies the criteria to the case in which a person's Mountaineers membership has expired.

In all cases below the policies recommend the time at which someone *may* be removed from the roster, but there may be reasons to leave a person on the roster longer, such as a special role they have in the program or other circumstances unique to an individual. There may also be extenuating circumstances that affect many or all members on the roster, such as seasons where weather or other route conditions significantly reduce or even eliminate the ability to offer courses or trips (extreme fire years for example). In such cases it is up to the discretion of the Committee to decide whether to leave people on the roster longer. It is expected that such decisions will be weighted toward inclusion by leaving people on the roster longer when the decision is not clear cut.

Leader Inactivity

Recommended policy: Retain membership in the Leader roster group for **three years** since the date of the most recent qualifying trip or other activity led or co-led by the volunteer. (See [Qualifying Trips](#) below.) Before removing their Leader status, send a reminder email and allow them a grace period during which they can choose to lead a trip to “reset the counter” and retain their Leader status. The grace period is one year.

Justification: Trip leadership is something that requires significant commitment and investment of time to achieve and maintain, and we want to respect the time and effort the member has invested in becoming a trip leader. Moreover, trip leaders are critical to the success of any program, and *experienced* trip leaders even moreso; we want to do what we can to retain them and allow them to resume their leadership activities without placing unnecessary obstacles in their path. At the same time, we recognize that trip leadership is a perishable skill,

therefore we don't want the retention period to be too long. Allowing a lull of up to 3 years seems like a reasonable compromise, especially considering that there will be an additional grace period at the end of that 3 year period.

See also [Appendix: Leadership Maintenance Requirements of Other programs](#), which documents the leader inactivity requirements for some other Mountaineers activities. Several other programs and committees specify a 3 year Leader Activity requirement in their Minimum Standards documents, which appears to be a de facto standard.

Instructor Inactivity

Recommended policy: Retain membership in the Instructor roster group for **four years** after the date of the most recent activity at which the volunteer served as an instructor or other relevant course role. After that, the volunteer's Instructor status can be removed without notification.

Justification: Even though the roster's Instructor group does not confer any special privileges to the volunteer, it still serves two very important purposes. First, it acts as a database of members who are not just potential instructors for future courses, but who are also candidates for additional roles in the program. Put another way, it is a list of potential "up and comers". Second, for many members it is the relationship that causes the program's name to appear in the list of committees on their profile page (see image). Though this may not matter for some members, for others it helps establish a connection between the member and the program, and is also a sign of status for some members. Hence in some cases this increases the member's satisfaction with the program, and can be a positive recruiting tool. This argues for a longer retention period than for most other committee roles. Even though instructor knowledge is perishable, usually the amount of training required for instructing at a backpacking course is relatively small - instructors usually get a pre-course refresher from the course leaders - therefore the consequences of a longer retention period are minimal, which also argues for a long retention period for instructors.

COMMITTEES

- ▶ Seattle Backpacking Committee
- ▶ Seattle Hiking Committee
- ▶ Seattle Navigation Committee
- ▶ Seattle Snowshoeing Committee

Committee Member Inactivity

Recommended policy: Retain membership in the Committee Member roster group for **one year** after the date of the most recent committee-level participation by the member, or remove Committee Member status immediately if the member formally transitions off the committee, for example due resignation or the completion of a predetermined term of service.

Justification: A program's list of active committee members is used very frequently in the normal course of operations for most programs. For example, it is the basis for group emails, meeting invitations, etc for the programs committee meetings, both regular and ad-hoc. It is

important that it be kept up to date. Therefore we choose a much shorter expiration policy than for other roles in the roster. Most of the time the transition of someone on or off the committee is a well-known event and the roster is actively managed in real time when such an event occurs. Therefore we do not expect the passive expiration policy described here to be invoked very often, but rather it will end up being used as a fallback in case a bit of active roster maintenance is overlooked.

Overall Program Inactivity

In the normal course of removing people from roster groups, the number of roster groups to which the person belongs can reach zero. *Usually* (see exception below) this means that the person is no longer an active volunteer for the program, in which case **the person can be removed from the roster entirely**. In such cases the person can be removed from the roster immediately upon removal from the final roster group. There is no need for an additional delay because each of the roster group retention policies already includes a delay.

An exception to this policy can occur when a member is included in the roster for reasons other than one of the roles described by the roster groups. As mentioned in [The Committee Roster: Four Rosters In One](#), sometimes a person can be included in a program's roster for ad-hoc reasons, such as historical documentation (e.g. "Treasurer 2014-2016"), documentation of an external relationship (e.g. staff who wish to be included in group emails), etc. These special entries must be handled on an ad-hoc basis by the committee administrators, and are outside the scope of this policy.

Expiration of Mountaineers Membership

Should a person's Mountaineers memberships expire they can be removed from the program's roster after a suitable grace period.

Recommended policy: Retain for **two years** after membership expires. Do not send a reminder email.

Justification: Most long term members will keep their Membership current even during long periods of inactivity. If someone lets their membership expire it usually indicates an intentional decision to leave the club, rather than a temporary hiatus. Because there is higher confidence that the member really has withdrawn from the Club there is higher confidence in using a relatively short two-year time retention period.

One-Time Policies Upon Adoption Of This Policy

As of this writing (April, 2020) there has not been a comprehensive roster retention policy for the Backpacking Committee for many years. Therefore the policy includes a one-time “catch up” policy to be applied upon adoption of the policy.

Specifically, people on the roster who have had no involvement with the program as a leader, instructor, or committee member for over 10 years may be removed without notification. This is expected to significantly reduce the administrative logistics required to implement the policy. Also, in the case of trip leaders, people who have not led a trip in over ten years need to refresh their skills anyway (see the discussion of perishable skills in the [Leader Inactivity](#)).

Appendix: Leadership Maintenance Requirements of Other programs

Many other Mountaineers committees and activities require trip leaders to keep their skills current by leading trips regularly. Here is a sample of such policies that appear in various Clubwide minimum standards documents. In addition to these some branch committees also specify leadership maintenance requirements.

Note that all policies that include a specific time frame specify 3 years. That seems to be the de facto standard across the club.

[Canyoneering Minimum Standards](#): *“Leaders are expected to lead Canyons within their ability, to maintain their leadership and technical skills through regular practice and training, and to be up to date in current Canyoning skills & techniques taught by The Mountaineers.”*

[Scrambling Minimum Standards](#): *“Leaders must demonstrate skill maintenance by satisfactorily leading **at least one trip every three years** for the committee(s) for which they are approved as leaders.”*

[Climbing Minimum Standards](#): *“Leaders are expected to lead climbs within their ability, to maintain their leadership and technical skills through regular practice and training, and to be up to date in current climbing skills & techniques taught by The Mountaineers.”*

[Skiing Minimum Standards](#): *“Lead **at least one ski trip within every consecutive 3 year period** from the date of initial approval as a Ski trip Leader. The ski trip must be a Skiing Committee sponsored ski Trip.”*

Sea Kayaking Minimum Standards: “Leaders must demonstrate skill maintenance by satisfactorily leading **at least one trip every three years.**”

Navigation Minimum Standards: “Certification is **valid for three years**”

Document History

June 16, 2020	Removed references to this document as a proposal. It has been adopted.
May 14, 2020	As per reviewer feedback added new section Appendix: Leadership Maintenance Requirements of Other programs .
May 12, 2020	Updates as per reviewer feedback: Extended definition of leader inactivity to include trips that leader has co-led or led. Add notification before removal due to Committee Member Inactivity.
April 20, 2020	Simplified and reorganized document as per feedback from April 19 conference call. Added specific time periods for Leader grace period and for expiration window in the one-time adoption policy.
April 16, 2020	Simplified section that describes the structure of a committee roster.
April 14, 2020	Initial rough draft sent for internal review