Attendance:
https://www.mountaineers.org/locations-lodges/seattle-program-center/events/blc-retreat-1

Presentation of our current organizational structure, as well as existing road blocks and dead ends: 🟧 BLC Retreat Fall 2022

Feedback about Safety and Incident Reporting
- Should be separate from program operations for more objective review of incidents.
- Issue Tracker: Need better tools/technology to capture, track, forward, report, recognize incident trends.
- Safety should inform RMC of incident trends, for review as a possible risk management gap.
- Should be administered by a staff member.
    - Minor incidents are delegated to branch or activity safety chairs for follow-up, anything bigger (or any trends) are redirected to the program owner for follow-up, and held accountable by that staff.
    - This also gives Safety a direct line to the CEO (reports direct to CEO or via staff hierarchy), for review/resolution of major issues.
    - Concern with exposure of a volunteer making judgment calls to evaluate incidents. Should be a paid/trained staff person.

How do members build community at The Mountaineers?
- Branches - Members who live in similar geographic area
- Activities - Members who enjoy the same activities

Trips & Activities: Less tied to branches. Builds community within favorite activities. Can happen anywhere. Some members may look for other people they know (through branch connections), but members are generally looking for destinations/activities of interest, and that often isn't tied to branch affiliation. (Ex: All branches lead climbs in the North Cascades.)

Courses: More tied to branches. Community-centered educational opportunities. Tend to be focused around a geographic region for in-town lectures or practice sessions. Tends to draw from a volunteer community in that area, for ease of gathering.

Functional Organizational Model
Idea: Flip structure, organize The Mountaineers around things we do first, followed by where it happens

Separating programs (trips and courses) from where they happen. Branches could "franchise" courses, or become a community hub to promote membership, mentorship, social events, build community and help advocate and implement club-wide strategic initiatives.

Opportunities:
- Could have org-wide Safety Officers by activity, more expertise for reviewing incidents

- - ○ Could bucket "like activities" under one Safety Officer to streamline
    - ■ Ex: Non-technical, on-trail travel
- Centralized standards, processes, curriculum for each activity
  - ○ Centralized body to asses exceptions to standard (ex: Snowshoe Programs at Meany)
  - ○ Standardization improves risk management
  - ○ Documentation is key
- Offering leader vetting/badges centrally allows for easier scalability
  - ○ Rather than needing to start a new branch committee to offer an activity, could be vetted centrally to offer an activity for the organization
- Gives a more natural home for activities/programs that currently exist outside of the branch structure
  - ○ Youth Programs, Global Adventures, Alpine Ambassadors
- Centralized, transparent pathways improve ability to welcome new people into leadership
  - ○ More "gradation" of leadership
    - ■ Creating different leader levels (ex: Basic, Intermediate) could make it easier for volunteers to get in the door and start leading easier, less risky trips
- Reduce burden of bureaucracy to manage multiple activities within branch
  - ○ Simplifies org-wide administrative duties, allows for greater specialization by activity
  - ○ Branches could focus on courses and education delivery
    - ■ Or branches could focus on promoting courses most relevant to members in their geographic area
- Would give branches more time to focus on community building
  - ○ Branch chair role could turn into more of a social chair, limits scope of role
  - ○ Free up volunteer time to do more outreach, volunteer recruitment
- Volunteer bandwidth to have a Youth Chair, Equity & Inclusion Chair for each activity type
- More levels of volunteer leadership (and program or branch level) could create more opportunities for entry
- More potential to modularize activity structure through layered "endorsements"

Concerns:
- Fear losing sense of community around branches, uniqueness
- Will smaller branches have equal weight in voice?
  - ○ Question: How would we organize branch representation at Activity Councils?
- Lack of flexibility to vet leaders across programs with different needs
- Centralized standards might not actually work well for all programs
- Social impact of perceived and/or real loss of control over branch programs
- How would this model address volunteer recruitment/retention?
  - ○ Recognize impact of Seattle students that take courses at other branches, then do not come back to volunteer

- If Activity Council is prerequisite-oriented, could lead to gate keeping
- Difficult to recruit volunteers into high(er) leadership roles
  - Especially in activities like first aid, leadership that do not generate volunteers

Assumptions:
- Some branches have a stronger sense of community across courses/activities.
- Branch identity is only one way members find/build community at The Mountaineers. Members have cultivated community though:
  - Student cohorts through courses
  - Relationships built through trips and activities
  - Affinities, shared interest or background
  - Phase of life or age group

Questions:
- From a risk management standpoint, how important is standardization vs customization?
  - Standardization can play a significant role in improving safety and risk management, but program customization is also a meaningful and important part of our current operations. For example:
    - Determining costs of course relevant to area
    - Customized course requirements or leader prerequisites (exceeding standard) can help progress the standard for the whole organization
    - Supporting volunteers to take ownership in building cohorts and community generates higher engagement and retention
    - Creates space for innovation in course administration, activity planning, equipment selection, curriculum development

We have a functional precedent with our avalanche education programs
- Centralized leadership across branches
- Offer courses in different geographic areas based on volunteer availability, preferred course locations, member interest
- Look at what is happening with this model, what is working well, are there learnings we can take?

Ideas for new roles:
- Facilities Manager - Support facility operations of program centers and lodges.
  - Staff position or Board position? Reframed VP of Outdoor Centers?
  - Centralizes all "like" issues for facilities (infrastructure, insurance, etc).
- Safety Manager - Separates safety from program operations for more objective review.
  - Staff position creates even more separation from operations.
- VP of Programs/Activities - Oversees activity operations across all program locations.
  - Board position necessary in Functional Organization model.
  - Would create cleaner oversight of Global Adventures and Youth Programs, which currently exist outside of branch structure.

○ This position could also look externally to benchmark activities at other organizations.

<u>Branch Charters</u>
- By March, all branches (and lodges) should have charters to be approved by the Board
- Looking to branches/lodges to tell staff how to make this as easy as possible for you