

**COLORADO MOUNTAIN CLUB  
STATE BOARD MEETING MINUTES  
January 24, 2009  
AMERICAN MOUNTAINEERING CENTER, GOLDEN, COLORADO**

The meeting was called to order at 11:15 a.m. by Janice Heidel, outgoing State Board President. Other outgoing Board members in attendance were Art Hogling, Vice-President and David Hite, Secretary. Other Board members in attendance were Jim Berryhill, Bill Brown, Dale Hengesbach, Earl Hughes, Nickie Kelly, Carol Kurt, Dana Miller, incoming Treasurer; Paul Raab, John Raich, Sherry Richardson, Jim Riddell, Lee Rimel, Ed Seely, Bill Strathearn, incoming Vice-president; David Tabor, and Wynne Whyman, Incoming Board President. Others attending were Executive Director Katie Blackett, Controller Cathy McGuire, Denver Group Chair Linda Lawson; and Bill Markley and Greg German, Denver members.

**Member Comment Period**

Linda Lawson called attention to a program on lighting that will be presented by the Denver Group April 2, 7-9 p.m. at the AMC.

**Approval of October Board Minutes**

The October 18, 2008 draft was approved with one correction: Karen Hickey's name was added to the meeting attendance.

**Report from the CMC Foundation**

Foundation Secretary Sherry Richardson briefly reviewed the purposes and activities of the Foundation and reported that Walt Borneman is the new Foundation Chairman. Susan Baker is Vice-President. Foundation liaisons to the primary CMC departments have been selected. The Foundation's primary goal is to retire the \$300K Museum debt. A February 4 luncheon will initiate the new fund raising campaign.

**Financial Audit Report**

Sue Engle of Kundinger, Corder & Engle summarized the CMC's FY 2008 financial statement. The Board recessed for the purpose of an executive session. Returning from its executive session, a motion was adopted to approve the audit report.

**Report of the Ad HOC Committee on Scrambling Trips**

Before presenting the report's recommendations, John Raich, Ad Hoc Committee chair, noted that there may be upwards of 100 climbing accidents each year in North America, but few are reported. He suggested that it is not realistic to assume that hiking accidents will not happen. The

CMC has no statistics on accidents, but accidents have been few. Proceeding with the committee report, John summarized four recommendations: 1) on scrambling trips, leaders should be more forthcoming in their trip descriptions; 2) groups should clarify where scrambling trips fit into a trip classification system; 3) trip leaders should develop a standard list of questions to ask trip participants to gauge their ability levels; and 4) leadership training should include alpine scrambling.

Board discussion lead to agreement with the report's statement that management of club trips and schools is primarily the responsibility of local Groups. Linda Lawson asked if Adventure Travel and HAMS will follow the Ad Hoc Committee's recommendations. Janice Heidel noted the report will be distributed throughout the CMC.

*The Ad Hoc Committee Report is attached as Appendix A.*

### **Two/Three Person Technical Climbing Policy**

Lee Rimel and Greg German summarized their proposal to change current provisions found in the Safety and Leadership Section of CMC's policies to allow for an exception to the four-person minimum as that requirement applies to certain multi-pitch climbing trips. Greg explained the intent is to allow smaller groups to climb in popular areas where it is reasonable to assume rescue assistance is always relatively close by.

After discussion, the following motion was adopted by the Board:

Allow the following exception to the 4-person minimum for official CMC trips:

2-member multi-pitch rock climbing trip-

- the leader must be approved to lead multi-pitch climbs (TLCS or equivalent, plus trip leader training and WFA)
- the second member must have taken RSS, BMS, or equivalent
- 1.5mi/1500' approach maximum in non-remote areas when other climbers are around.

3-member multi-pitch rock climbing trip-

- the leader must be approved to lead multi-pitch climbs (TLCS or equivalent, plus trip leader training and WFA)
- the second member must have taken RSS, BMS, or equivalent
- the third member must have taken BRCS or equivalent (since the middle climber can climb with no other responsibilities)
- 1.5mi/1500' approach maximum in non-remote areas when other climbers are around.

The Board agreed that an *ancillary statement* should be included in the leadership manual to encourage trip leaders to use discretion in applying this policy -- discretion that includes existence of cell phone coverage.

### **CMC Organization Chart**

After Board discussion of the chart and the narrative accompanying the chart, a motion was adopted to approve the document. It was agreed that the organization chart should be viewed in conjunction with the constitution, bylaws and policies of the CMC, which define the specific relationships between and among these administrative units.

The Organization Chart is displayed below. *The narrative is found as Appendix B.*

### **Joint Development Committee**

After a short Board discussion, a description of CMC/CMC Foundation Development Committee was adopted, with one change.

### **Presentation by the State Treasurer: changes to committee description and treasurer description in the Bylaws and handbook**

Dana Miller proposed that changes be made pertaining to the job description of the State Treasurer as well as the wording of the Governance Committee document of 10/18/08 describing the duties of the State Finance Committee.

A motion was adopted that the Duties of the Finance Committee, as outlined in the document on Governance Committees on 10/8/08, be amended to remove line 2, "Maintain control over CMC assets" and that the following duties to this committee -In addition to the duties currently stated, be added:

- Perform periodic evaluation of the financial strength of the organization.
- Ensure appropriate financial reports are made available to the board on a timely basis.
- Every five years, manage the bid process for an independent auditor (as recommended by COSO guidelines)
- Every five years (at a minimum) conduct a dues study per CMC policy.

A second motion was adopted as follows: that the job description of the Treasurer, in Article IV, Section 4 of the By-Laws of the Colorado Mountain Club be written as follows:

The Treasurer shall have an understanding of accounting records for nonprofit organizations, shall serve as Chair of the Finance Committee and assume direct responsibility for all duties of the Finance Committee, shall perform, and report back to the board on, periodic evaluation of the financial strength of the organization, and shall support the organization's Executive Director and Controller in their duties of managing the budget and the accounting records of the CMC.

A third motion was adopted to change the job description of the Treasurer as written in the Board manual to read as follows:

The Treasurer shall:

- Attend all board meetings
- Maintain knowledge of the organization
- Maintain a personal commitment to its goals and objectives
- Understand financial accounting for nonprofit organizations
- Manage, with the Finance Committee, the board's review of and action related to the board's financial responsibilities (i.e. keep the Board apprised of, and educated about, the financial position of the Club)
- Serve as the chair of the Finance Committee
- Ensure all duties of the Finance Committee are carried out, including:
  - Specify and monitor financial accounting and budgeting policy and procedures.
  - Perform periodic evaluation of the financial strength of the organization.
  - Ensure appropriate financial reports are made available to the board on a timely basis.
  - Make investment recommendations.
  - Review the annual audit before it's presented to the Board
  - Present annual operating budget to the board for approval

- Work with the Board Governance and Policy Committee to conduct board training: a) 1) how to read financial statements as a board member and 2) financial responsibilities for board members.
- Review the AMC budget for short-term and long-term needs.
- Every five years, manage the bid process for an independent auditor (as recommended by COSO guidelines)
- Every five years (at a minimum) conduct a dues study per CMC policy.

### **Proposed Merger with Backcountry Snowsports Alliance**

Janice Heidel reported that she and Katie Blackett, Wynne Whyman, Clare Bastable, and Lee Rimel had met several times with the Backcountry Snowsports Alliance (BSA) to discuss a merger of BSA with the CMC. Lee Rimel reviewed the strengths believed to result for each organization if merger was approved. After Board discussion, including concern over the issue of perpetual BSA representation in addition to Lee Rimel on the CMC State Board, a motion to approve the following was adopted.

The Colorado Mountain Club (CMC) and the Backcountry Snowsports Alliance (BSA) hereby resolve to implement a merger to enhance the missions of each organization, serving the interests of non-motorized backcountry winter recreation; to recognize, support, and preserve the current BSA chapters; to enhance the purpose of the BSA by forming a committee initially comprised of current BSA board members to assist the CMC Conservation Department; to continue BSA fundraising activities and provide leadership to current BSA chapters; and the CMC Board of Directors shall include representation from the current BSA BOD in addition to Lee Rimel.

### **Executive Session**

A motion was adopted to move into executive session for the purpose of discussion of budgetary matter, and after a presentation by the Executive Director, the executive session concluded.

### **Presentations to Officers Leaving the Board and Election of New Officers**

Presentations were made to Janice Heidel, President; Art Hogling, Vice-president; and David Hite, Secretary; for their service to the Board for the last three years. Wynne Whyman, incoming President, welcomed new Board members serving their first year of a three year term, Jim Berryhill, Nickie Kelly, and Paul Raab. Dale Hengesbach begins a two-year term. In addition, Lee Rimel begins his first year of his second three year term, and Dana Miller will serve as Treasurer, and Bill Strathearn was elected Vice-President. David Hite will serve as Acting Secretary. Two Board member positions remain open.

### **Comments from the New Board President**

The hour of 4 p.m. having arrived, Wynne Whyman explained what she hoped would be Board members' level of involvement in Board responsibilities, and thoughts on how Board can best work together during the year. Wynne also ask Board members to complete a form identifying their commitment to development and fundraising on behalf of the Club during the next year.

### **Board Retreat**

Jim Berryhill reported on plans for the April State Board retreat to be held at The Aspen Lodge outside of Estes Park.

### **ExCom Committee Members and Operating Committees for Membership on State Council**

A motion was adopted to accept the appointment of the following members to the ExCom: Bill

Strathearn, David Tabor, Jim Berryhill, Lee Rimel. The group is chaired by Wynne Whyman. As a method of selecting State operating Committees to be represented on State Council for 2009, Wynne ask Board members to select by ballot five committees from among a list of eighteen operating committees, operating advisory councils, and operational tasks teams and give their choices to the Board Secretary for tabulation. The five receiving the greatest number of votes were: Development Support Services, Membership and Group Services, Risk Management/ Safety & Leadership, Conservation and Stewardship Advisory Council, and Leadership Training.

#### **Quit Claim Deed for Testamentary Gift**

After discussion, the deed, as presented, was approved. A copy of the signed deed is filed in the CMC offices in Golden. See attachment.

#### **Insurance Coverage**

Nickie Kelly reported that a review was conducted for both D & O and liability coverage, and that the coverage limits will remain the same. One point appears to require further review. There is some concern as to the coverage of an officer or director performing volunteer work for the CMC outside their scope as an officer or director. It appears they are covered. However, it is unclear under which statute. Clearly, they are covered by insurance.

#### **Student Membership Rate**

Katie Blackett suggested the CMC needs a student membership rate in order to attract younger individuals to the CMC. She believes that this would be a start in restarting the juniors group. Her proposal is to define a CMC student as anyone between the ages of 13-30 enrolled in an educational institution. A student dues rate will be studied as part of the overall dues rate study.

#### **Library usage Fee Change**

As background, Katie Blackett noted the CMC's partnership agreement with the American Alpine Club regarding the storage of CMC books in the Henry S. Hall AAC Library dates back to 2001. Ten percent of the Library collection belongs to the CMC. The AAC desires to significantly raise the CMC contribution for the current fiscal year. Because of continued economic pressures on the CMC budget and the fact that under 15% of CMC members use the facility, Katie proposed termination of the Library partnership but in a manner that does not strain CMC's relationship with the AAC and gives CMC members the opportunity to become members of the Library.

After Board discussion, a motion was adopted to negotiate a withdrawal from the financial contract of CMC support for the AAC Library. Consideration will be given to continued membership access to the CMC collection of books and the allocation of our current contribution to the Library to Club needs such as Safety and Leadership operations.

#### **Emergency Action Plan**

As an introduction to the proposed EAP, Katie Blackett reported that during her short tenure a number of incidents have underscored the need for such a plan. In addition, the Board's Strategic Plan calls for the creation of such a document. Katie and Brenda Porter attended a Wilderness and Risk Management Conference last October and have incorporated information into the proposed EAP from that meeting. Katie reported that if adopted the Plan will be posted electronically on the CMC Website as a first step in an updated Leader Section on the site. The EAP will be found in the T&T and other email communications from the Executive Director. Katie noted that Groups can amend the Plan as they find necessary to fit their needs.

After Board discussion a motion was adopted stating that it shall be the policy of the CMC to have an emergency action plan. It will come from the efforts of the Executive Director and the leadership team and the results made available to all CMC leaders.

### **Signatories for Bank Accounts and Procuring a Line of Credit**

Wynne requested she and Dana Miller be added as signatories for CMC's bank accounts, replacing officers who have left the Board, Janice Heidel and Art Hogling. A motion implementing the request was adopted.

Katie Blackett recommended that a line of credit be opened with the Club's bank. The LOC would be strictly a safety net and used only when payroll or mandatory bills must be paid and cash is short. A motion was adopted to establish a \$25K LOC.

### **Electronic Media Policy**

Katie Blackett stated there is some confusion surrounding what can be posted on the CMC website, and what member information can be used. She suggested that a policy distributed to the Board would clear up confusion and state that items posted on the website are not the opinion of CMC, employees, etc. After Board discussion, a motion was adopted to refer the matter to the Governance Committee.

### **Additions of to the Agenda**

David Hite reported that CMC Archivist Woody Smith was recently honored by the publication of his article in the Colorado Historical Society's Colorado Heritage magazine. The article is entitled "Climbing the 'High Tops' with Mary Cronin and the Colorado Mountain Club." The Board requested that David write a note of congratulations to Mr. Smith.

### **Adjournment**

The meeting was adjourned at 5:50 p.m.

David Hite, acting secretary

### **Attachments to the Minutes**

The following documents will be attached to these minutes in the final, uploaded version found on the Club website.

- 1) Report of the Ad Hoc Committee on Scrambling Trips; (pages 7-24)
- 2) The Club Organization Chart and Narrative; (pages 25-34)
- 3) Joint Development Committee description; (pages 35-36)
- 4) Background on the Proposed Merger with Backcountry Snowsports Alliance; (pages 37-38)
- 5) Descriptive Information regarding Quick Claim Deed for Testamentary Gift; and (page 39-40)
- 6) Emergency Action Plan. (available online, as mentioned above)

**December 14, 2008**

## **REPORT OF THE AD HOC COMMITTEE ON SCRAMBLING TRIPS**

TO : Janice Heidel, President, Colorado Mountain Club [janice.palmer@lmco.com](mailto:janice.palmer@lmco.com)  
Katie Blackett, Executive Director, Colorado Mountain Club  
[katieblackett@cmc.org](mailto:katieblackett@cmc.org)  
Colorado Mountain Club State Board of Directors

COPIES TO: Colorado Mountain Club Group Chairs  
Colorado Mountain Club Climbing School Directors  
Colorado Mountain Club Leadership Taskforce

FROM: John Raich, Chair, Ad hoc Colorado Mountain Club Committee on Scrambling Trips

The report of the ad hoc committee on scrambling trips is submitted for your consideration.

### **COMMITTEE MEMBERSHIP**

Cindy Gagnon [gagnonc2@comcast.net](mailto:gagnonc2@comcast.net), Boulder BMS director  
Dave Goldwater [goldwaterd@aol.com](mailto:goldwaterd@aol.com), trip leader and scheduler  
Eli Helmuth [eli@climbinglife.com](mailto:eli@climbinglife.com), professional AMGA mountain guide  
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Dave Turk [dturk@cityofgolden.net](mailto:dturk@cityofgolden.net), trip leader

### **CHARGE TO THE COMMITTEE**

The charge to this ad hoc committee of the CMC Board of Directors is defined in the review documents for the June 28, 2008 climbing accident on the Crestone Needle: "To review scrambling trips and see if recommendations to CMC trip leaders and school directors need to be made."

This charge directs the committee to review CMC current practices on scrambling trips in general rather than to examine specific trips. The main task of the committee is not to review specific accident reports but to decide if it is possible to improve the safety of CMC scrambling trips by modifying current practices or implementing new practices on scrambling trips. At the same time, we want to ensure that we don't impose undue burdens on trip leaders and instructors or make participation in scrambling trips significantly less enjoyable. The committee should also consider the possibility of suggesting modifications of CMC leadership development programs that impact on scrambling trips.

The committee started with a summary of background information, provided by the committee chair. That summary defines related issues and questions. Committee members had the opportunity to provide input to modify the background information. In addition, committee members added other questions and ideas for the committee's consideration. By necessity much of the communication within the committee was via e-mail.

The product of the ad hoc committee is a set of recommendations to the CMC President, Executive Director, and State Board. Before finalizing the committee recommendations, the committee requested feedback on the preliminary recommendations from all CMC climbing school directors not represented on the committee. The management of CMC trips and schools is mainly a responsibility of CMC Groups. Hence, the committee will send copies of its recommendations to Group chairs and Group officers who will make any implementation decisions.

The committee expects that its recommendations will constitute input to a newly constituted CMC Leadership Taskforce. A role of that group is to provide expertise and resources for outdoor leadership training development to be implemented throughout the CMC.

## **BACKGROUND INFORMATION**

### **WHAT IS SCRAMBLING?**

Dave Cooper, in *Colorado Scrambles*, describes scrambling in the Colorado mountains as encompassing the realm between off-trail hiking and technical climbing. Scrambling involves movement over challenging and often exposed terrain without the need to rope up, although ropes are often needed for portions of scrambling routes. Snow travel is often an integral part of scrambling. The practice among recreational climbers is that roped climbing dictates the use of some sort of protection. Simul-climbing without placing intermediate protection is rarely practiced. Most scrambling trips in Colorado involve class 3 and/or class 4 routes, occasionally some class 5, and of course, much class 2 terrain. Class 4 is probably the most subjective rating. One definition for experienced climbers might be that irrespective of whether or not one uses a rope to climb up 4<sup>th</sup> class terrain, one will likely want the security of a rope when descending the same terrain. Inexperienced climbers may want to be roped on ascent as well.

A somewhat different perspective from the UK is found at

<http://en.wikipedia.org/wiki/Scrambling>: Alpine scrambles are off-trail trips, often on snow or rock, with a ‘non-technical’ summit as a destination that is usually reached without the need of technical climbing gear and not involving travel on extremely steep slopes or on glaciers. This can mean negotiating lower angle rock, travelling through talus and scree, crossing streams, bushwhacking, and walking on snow-covered slopes. Although ropes may be necessary on harder scrambles, sustained use of rope and belay probably counts as climbing. The use of a rope in scrambling is typically limited to rappelling or for safety uses other than belays up a vertical face. Scrambles are typically assumed to have an exposure of no more than around 10 feet (3 meters), the greatest height easily survivable in a fall. While much of the enjoyment of scrambling depends on the freedom from technical apparatus, unroped scrambling in exposed situations is potentially one of the most dangerous of mountaineering activities. For this reason, most guidebooks advise carrying a rope, especially on harder scrambles, which may be used for security on exposed sections, to assist less confident members of the party, or to facilitate retreat in case of difficulty.

### **CMC TRIP CLASSIFICATIONS**

CMC trips are classified according to the following criteria:

- Class A: Up to 8 miles round trip, 1,200’ elevation gain; prior hiking experience usually not necessary.
- Class B: up to 12 miles round trip, 2,500’ elevation gain; moderate to strenuous physical activity; some prior experience is beneficial.



- Class C: Up to 15 miles round trip, 3,500' elevation gain; strenuous to very strenuous physical activity; prior experience and training are beneficial.
- Class D: Over 15 miles round trip or 3,500' elevation gain, very strenuous physical activity; often includes exposure or requires technical skills; knowledge based on prior experience and training is highly beneficial.
- Within each of the above letter classifications, hikes are also described subjectively as 'Easy', 'Moderate', or 'Difficult'.
- The letter 'E' after the classification, such as C-E or D-E, indicates that the trip involves exposure, i.e. risk of falling and may require advanced climbing skills.
- 'Scrambling': The trip involves class 3 climbing, i.e. climbing that is relatively easy with plentiful handholds. Although a rope is rarely required, class 3 climbing may be intimidating for less experienced mountaineers. Always consider bringing and wearing a climbing helmet to ensure your own safety. A fall on a class 3 route usually results in a minor injury, but can on occasion result in serious injury or death.
- 'Semi-technical': the trip involves class 4 climbing, i.e. within the realm of technical rock climbing, but with relatively plentiful handholds. Some people will desire a rope, but usually just for protection on the descent. Participants must wear climbing helmets. A fall without the protection of a rope on a class 4 route usually results in serious injury or death.

The ad hoc committee's report focuses on CMC trips designated 'C', 'C-E', 'D', 'D-E', 'scrambling', and 'semi-technical'.

## TECHNICAL DIFFICULTY DEFINITIONS

In the North American system, the technical difficulty of a climb is called class. From *Alpine Climbing* by Mark Houston and Kathy Cosley:

- Class 1: Hiking.
- Class 2: Hiking on very rough, though generally not very exposed, broken ground, such as talus and boulders.
- Class 3: Scrambling on exposed, broken terrain. A rope might be carried. Most climbers either solo or move together on a shortened rope.
- Class 4: Climbing usually with short belayed sections, but also occasionally roped but moving together. Sometimes climbed solo by experienced climbers.
- Class 5: Technical, high-angle climbing, usually belayed, broken into decimals from 5.0 to 5.15.

See also "Summary of Climbing Practices on Intermediate Terrain" below.

Examples from *Colorado's Fourteeners* and *Colorado's Thirteeners* guidebooks by Gerry Roach:

### Class 3

- Longs Peak, Keyhole Route
- Crestone Needle, South Face
- Mt Bierstadt to Mt Evans Traverse

### Class 4

- Pyramid Peak, NE Ridge
- North Maroon Peak, NE Ridge
- Mount Wilson, North Slopes

### 5.0-5.3

- Little Bear to Blanca Peak Traverse
- Jagged Peak, North Face
- Dallas Peak, East Face

The Mountaineers club offers trips labeled as ‘alpine scrambling’. The prerequisite for participation is completion of an ‘alpine scrambling course’. Although these are considered non-technical, as of July 2007 the club requires that a rescue rope be taken on all scrambles. All scrambling trip participants should carry the light weight gear needed to make use of the rope and be familiar with its use.

Guidebooks in the UK use the following system for rating scrambling routes:

- Easy – generally off-trail hiking with minimal exposure (if at all) and perhaps a handhold or two.
- Moderate – handholds frequently needed, possible exposure, route finding skills helpful.
- Difficult – almost constant handholds, fall distance may be fatal, route finding skills needed, loose and downsloping rock, less experienced parties may consider using a rope for short sections.

This rating system overlaps YDS class 2, 3, 4, and easy 5.

### **TRIP PARTICIPANT REQUIREMENTS**

Participation in CMC trips is subject to the leader’s approval. To register for a trip by any CMC Group except the Denver Group, participants normally contact the trip leader. In the Denver Group, trip leaders can either designate a trip as ‘register with leader’ or allow participants to sign up on the website provided that they have the appropriate hiker or skier classification. Here are the Denver Group hiker classification requirements:

- B Hiker: 2 ‘B’ hikes, one must be a ‘Difficult B’
- C Hiker: 2 ‘C’ hikes, one must be a ‘Difficult C’, Wilderness Trekking School or waiver
- D Hiker: 2 ‘D’ hikes, one must be a ‘Difficult D’, Basic Mountaineering School or waiver, current First Aid certificate or equivalent

For example, to participate in any trip designated ‘D’ or ‘D-E’, a Denver Group participant must have a D Hiker classification or the leader’s permission. No additional requirements are specified for ‘scrambling’ or ‘semi-technical’ climbs other than leader approval.

### **CMC CLIMBING SCHOOLS**

Leaders of CMC climbs and school instructors, as well as trip participants, receive much of their training and experience through CMC climbing schools. Some, but certainly not all, of the CMC Groups provide training through a variety of schools, seminars, and clinics. The most comprehensive programs are offered by the Denver and Boulder Groups. For details, go to the websites:

<http://www.cmcschools.org>

<http://www.cmcboulder.org/bms/index.html>

The Denver Group climbing schools are summarized below. Most of these schools require prior completion of one or more basic CMC schools which are left off for brevity.

#### **Basic Mountaineering School (BMS)**

The goal of the school is to graduate members who can safely and competently participate in club mountaineering activities. The school provides participants with the following skills:

navigation and route finding, planning and organizing climbs, rock climbing skills for following on 4<sup>th</sup> and 5<sup>th</sup> class routes, and snow climbing skills up to and including roped climbing with crampons.

#### Beginning Rock Climbing Seminar (BRCS)

For those with little or no rock climbing experience. Participants learn to tie into the rope, belay, move over rock, and rappel.

#### Rock Seconding School (RSS)

RSS teaches participants how to be the ‘second’ climber on both multi-pitch trad climbs and sport climbs. Skills taught include: belaying, communication, knots, gear management, cleaning a pitch, cleaning a sport anchor, rope management, and rappelling. RSS is an alternative to BMS for those interested only in class 5 rock climbing.

#### Trad Lead Climbing School (TLCS)

An introduction to traditional lead climbing includes: a safety protocol for protecting the climbing team, techniques for building anchors that are equalized, redundant, no extension, solid, and timely, techniques for placing climbing protection, instruction on evaluating the adequacy of the placements relative to fall risk.

#### Technical Ice Climbing School (TICS)

TICS is designed for members who wish to extend their rock climbing skills to high angle ice found on frozen waterfalls, mountain couloirs, glaciers, and expedition climbs. The course focuses on techniques, movement on ice, efficiency, safety, and ice protection.

#### High Altitude Mountaineering School (HAMS)

The school trains students in basic technical skills of glacier travel, including crevasse rescue, low-angle ice techniques, rope management, and shelters. The sessions usually conclude with an optional trip to Mt Rainier or a similar peak.

It should be noted that none of the CMC Groups offer a course that is comparable to the Mountaineers’ ‘Alpine Scrambling Course’ which is intermediate between their ‘Basic Wilderness Travel’/Conditioning Hiking Series’ and their ‘Basic Alpine Climbing Course’.

### **QUALIFICATIONS OF CMC TRIP LEADERS AND SCHOOL INSTRUCTORS**

Expectations of leader preparation are defined by Groups and vary between Groups. In addition to CMC membership and age more than 18 years, the following are minimal requirements for leading trips with the Denver or Boulder Groups:

- A current first aid certification (MOFA preferred) with CPR.
- Successful co-leadership on two CMC trips of the same classification with an approved leader, that is, a leader-in-training trip.
- Successful completion of the Avalanche Awareness School for winter trips.
- Graduation from the Leadership Seminar.

For the Denver Group, an additional requirement is that leaders must attain a hiker or skier classification at the level of the hikes and ski tours they wish to lead. The Denver Group is the only CMC Group with ‘hiker classifications’ and ‘skier classifications’.

Leader qualifications for scrambling trips (‘C-E’, ‘D-E’, ‘scrambling’, and ‘semi-technical’ by the CMC definition) are basically those of ‘C’ and ‘D’ leaders as outlined here for most Groups. In addition, trip schedulers are able to exercise some control over the nature of a trip submitted by a leader. The qualifications of trip leaders and instructors of more technical trips are sometimes determined by the Group Section dealing with that activity, for example, by the

Denver Tech Section for technical climbing trips and schools. For the Boulder Group, 'C', 'D', rock, and ice trips first go to the BMS committee for approval for the technical aspects. Only a few CMC schools define instructor qualifications in their school descriptions. Instructor training usually takes place informally through time spent as assistant instructors under the mentorship of senior instructors.

## **UIAA TRAINING STANDARDS**

The UIAA (International Mountaineering and Climbing Federation) assists member organizations who wish to use training standards for their volunteer leaders and instructors. Although the CMC is not a UIAA member, it might make sense for the CMC to move towards those training standards on our own without UIAA assistance. Groups and schools would be free to use the UIAA standards as a guide and begin to adopt volunteer leader and instructor training standards in activity areas of interest to them.

As an example, the specifications for the training standards for one of 7 activity areas (mountain walking and trekking – summer; winter mountain walking and snowshoeing; sport climbing – fixed protection – single or multi pitch; rock climbing – with leader placed protection - single or multi pitch; ice climbing; alpine climbing; ski mountaineering) are outlined below. For details, see the website <http://www.theuiaa.org> and look under 'standards' and 'training standards.'

### **Example - UIAA Standard for Mountain Walking and Trekking (Summer)**

Includes steep terrain, scrambling, and overcoming obstacles such as small rock steps and patches of snow and ice. Not designed for use in situations that require mountaineering techniques to make progress such as rock or ice climbing.

1. Must define the type of terrain it applies to and the type of terrain that is outside the scope.
2. Candidates must be at least 18 years old.
3. Define minimum of prior experience (e.g. years, number of trips, different areas and terrain).
4. Skills

Test the candidates' ability to demonstrate effective personal techniques including:

Safe movement ascending, descending, and traversing mountain terrain including:

Steep ground

Broken or uneven terrain

Ridges

Gullies

Easy rock steps

Snow covered ground

Basic rope work

Route finding and navigation through typical and difficult terrain

Trip planning for groups

Organization and group leadership

Camping and bivouacs

Avoiding and solving common problems

Emergency procedures

First aid

5. Knowledge

Test the candidates' knowledge about and their ability to give advice on the following:

Recognition and treatment of exhaustion, hypothermia, cold injury, and heat disorders

Terrain and weather hazards

Trip planning, route choice, route difficulty ratings, guidebooks

Camping and mountain huts  
Nutrition  
Physiology and injury prevention  
Emergency procedures  
Environment and mountain culture  
Access  
Legal liability and insurance  
Training

## **LEADERSHIP SEMINARS**

Most CMC Groups offer leadership schools or seminars on a periodic basis. They are provided primarily for members who are interested in becoming trip leaders. The Leadership Seminar developed by the Boulder Group is an example.

Boulder Group Leadership Seminar Outline

<http://www.cmcboulder.org/bms/leadership/leadershipSeminar.html>.

- Ensuring CMC established trip procedures
- Communication skills
- Facilitating positive group dynamics
- Decision making skills for/with the group
- Crisis leadership
- Mountain hazards recognition
- Dealing with conflicts and emergencies
- Risk management
- Scenarios

It is a general perception of committee members that leadership training should include a practice session interviewing to screen participants on CMC trips. Sometimes, leaders do a lot of talking and don't listen enough.

## **CHARACTERISTICS OF CMC SCRAMBLING TRIPS**

- Great majority are summer season trips, a few winter trips.
- Most are 1-day trips, some are multi-day.
- The great majority are peak ascents in Colorado.
- Difficulty is mostly class 3, some class 4 or portions of class 4, occasionally short class 5 portions.
- Transitions between class 3 and more difficult and exposed terrain are not easily identified.
- Some scrambling trips involve ascending, traversing, descending snow fields and/or couloirs.
- Most scrambling trips are done unroped although rope/pro may be carried on some trips.
- An ice ax is usually required on trips where snow is expected on the route, crampons for hard snow.
- Helmets are recommended for 3<sup>rd</sup> class climbs, required for 4<sup>th</sup> class.
- Technical climbing gear may be carried on a few of the more challenging scrambles.
- Rope is more likely to be used on descent to rappel more difficult portions than on ascent.

- Denver Group participants must have an appropriate 'hiker rating', such as a 'C' rating for 'C' or 'C-E' trips, and a 'D' rating for 'D' and 'D-E' trips.
- Most scrambling trip leaders require participants to complete a CMC Basic Mountaineering School and MOFA or equivalent training.
- Participants come with a range of climbing experience from experienced climbers to relative novices.
- Minimum CMC group size on trips is 4.

### **SOME ISSUES RELATED TO SCRAMBLING TRIPS**

- Scrambling unroped allows participants to wander off from the easiest route into more difficult terrain.
- Many climbers have difficulty distinguishing between class 3, class 4, and even easy class 5 terrain.
- Some participants want to challenge themselves on more difficult terrain or stay away from other climbers to avoid dislodged rockfall.
- Leaders often have difficulties telling participants exactly where to climb.
- Transitioning between unroped and roped modes of travel takes time as does traditional roped climbing. Hence, there may be a tendency to continue climbing unroped through class 4 terrain, particularly if time is an issue.
- The minimum group size of 4 tends to discourage roped climbing and transitions between unroped and roped climbing. Roped groups of 4 travel considerably slower than smaller groups. On the other hand, the requirement of at least 4 participants is made for safety reasons in more remote mountaineering terrain.
- Climbing solo on relatively easy terrain is viewed by experienced climbers as more enjoyable than any sort of roped climbing.
- Scrambling unroped on class 3 and class 4 terrain is sometimes perceived as scary by novices. Hence, they may be slow to progress with their mountaineering skills.
- It is often difficult for trip leaders to determine the skill and experience levels of participants before the start of the climb.
- The CMC State Leadership Manual points out the need to select a rear leader on all trips who is the last person of the group at all times. In scrambling terrain, this may or may not be appropriate. For these types of trips, a qualified leader and co-leader are mandatory in the Boulder Group, but may not be for other Groups.

### **SUMMARY OF CLIMBING PRACTICES ON INTERMEDIATE TERRAIN (CLASS 3 TO EASY CLASS 5)**

Below is a summary of current climbing practices in what most would consider scrambling terrain (class 3 to easy class 5) from ACMG/AMGA *Technical Handbook for Mountain Guides*.

#### **TERRAIN**

Class 3 -----	Class 4 -----	Class 5 <sup>(a)</sup>
Climber generated rockfall likely -----	No climber generated rockfall	
No spontaneous rockfall likely -----	Spontaneous rockfall likely	
Easy climbing -----	Hard climbing	
Many ledges/breaks/blocky terrain -----	Few ledges/breaks	

Natural features such as rock horns ----- Few natural features

Low angle ----- High angle, steep

Large holds ----- Small holds

Solid holds ----- Loose holds

Incised terrain ----- Downsloping terrain

High friction, dry ----- Low friction, wet

Soft snow ----- Hard snow, ice

#### **SPEED AND SECURITY**

Need to move fast ----- Time not an issue

Slip only ----- Fall likely

Reduce exposure time to risk ----- Exposure time not a factor

#### **LEADER**

Relatively experienced ----- Relatively inexperienced

Familiar with route ----- Unfamiliar with route

#### **PARTICIPANTS**

Experienced climber(s) ----- New climber(s)

Single participant ----- Several participants

#### **TRADITIONAL RECREATIONAL CLIMBING (OLD-SCHOOL)**

Off-trail hiking ----- leader<sup>(b)</sup> and/or ----- Technical climbing  
Unroped scrambling group decides

Use route-finding  
communications,  
modeling, pace  
to keep the group  
together and on route<sup>(d)</sup>

Climb roped pitches<sup>(c)</sup>

Belayed climbing with  
protection for leader  
and second(s)

#### **ALPINE TECHNIQUES (NEW-SCHOOL)**

Climb unroped ----- | Guide or leader decides | ----- Climb roped -----

Use route-finding, Intermediate roped techniques<sup>(e)</sup> Technical climbing

communications, modeling, pace to keep the group together and on route <sup>(d)</sup>	(a.k.a. 'short-ropeing') Running and terrain belays	Moving belays	Climb roped pitches <sup>(c)</sup>  Belayed climbing with protection for leader and second(s)
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- (a) From *The Mountaineering Handbook* by Craig Connally: There is no definite demarcation in the degree of difficulty, exposure, and use of protection as the class rating changes from 3rd to 4<sup>th</sup> to 5<sup>th</sup>. In third class climbing, a rope would be used rarely, seldom for belaying the leader, and usually only for a short distance – an exposed move or two, a chossy or iced up section, or if a member of the party didn't feel up to the challenge. 4<sup>th</sup> class climbing would mean using a rope by most parties somewhere on the route, but intermediate anchors would be few and would be placed when convenient or to protect a difficult or exposed move. 5<sup>th</sup> class climbing would mean that the climbing moves, while not necessarily more difficult than for 4<sup>th</sup> class climbing, would be more continuous, as would be the exposure; intermediate anchors would be placed more regularly, with the expectation to protect a leader fall. Much of mountaineering lies in a gray area between technical and nontechnical, but 3<sup>rd</sup> and 4<sup>th</sup> class climbing is not merely incompetent 5<sup>th</sup> class.
- (b) The Boulder Group came up with a useful analogy to shepherding for leading scrambling trips: "The (co)leader could be more of a shepherd picking the best way through the terrain, but the other (co)leaders have important roles as sheep dogs. They should be at 1000% attention level when the group is going through a difficult section, they should assess the local terrain all of the time, anticipate and be in front or below the members to spot and support them in case they slip slightly. That means that (co) leaders move superactive through scrambling terrain and make 1000 quick decisions on what their most strategic position is to move the group safely through. The metaphor of dogs is in our view really good, because it also means that the position in the group is not fixed, they have to run back and forth to prevent slips or spot people."
- (c) Belaying full pitches on easy broken terrain can actually increase risk rather than reduce it; the rope catches on things; it sweeps loose rocks from ledges; it creates rope drag for the leader; it complicates rope handling.
- (d) From *Alpine Climbing* by Houston and Cosley: Experienced, careful, and confident climbers can be sufficiently safe without a rope on terrain they consider easy, even it is very exposed, and consequences of a fall would be disastrous. Instead of a rope, they rely on their climbing ability and on good routefinding. There are many advantages to climbing unroped, chiefly the added speed and efficiency, which can actually increase safety. Beyond that, soloing can enhance the feeling of freedom and engagement that is at the heart of mountaineering.

However, the psychological impact of exposure can have a huge effect on both the perceived and real risks of falling. The prospect of serious consequences affects our perception of this risk, even more than the difficulty of climbing does. Our perception affects our emotions (fear!), which in turn affect how well we climb.

When less experienced climbers choose to forego the rope, it is often not a function of their confidence. Rather it is because they don't know how to use the rope in a way that won't interfere or slow them down. The better you are at managing the rope while moving together, the less it will encumber you.



- (e) From *Alpine Climbing* by Mark Houston and Kathy Cosley: There are many gradations of security between unroped soloing and full-pitch belayed climbing. The first step towards greater security is to shorten the rope, and move together as much as you can, allowing you to belay only when truly necessary. A short rope simplifies rope management and allows you to move quickly and efficiently between belayed sections. Simply by virtue of roping up, you have not necessarily provided more security for the roped climbers; you have increased the risk that if one falls, the rest may be pulled off as well. What this tactic does allow you is to have the rope ready in more protective ways as soon that is called for.

Security can be increased on rock terrain using a range of belay methods and options, which the leader chooses according to his/her assessment:

- Running and terrain belays – The rope can occasionally be placed across the ridge crest or over solid rock horns between climbers as the group climbs simultaneously. This tactic does not prevent falls but reduces the risk of severe injury. Real protection on this type of terrain comes from constant and careful assessment of difficulty and the group's climbing abilities and comfort level.
- Short pitch belayed climbing – Belay a move or short section on which a fall seems possible and the consequences dire but the move or section is not long or difficult to warrant placing leader protection. This tactic keeps the rope team on the mountain if one member should fall. It helps to maintain momentum by keeping rope management simple and avoiding the problems of belayed climbing with long pitches and leader protection. Injury may still be likely or even severe in case of a leader fall, but the technique provides good protection for seconds. This kind of 'easy' terrain where this tactic is appropriate makes up the greater part of many alpine rock climbs and is the hardest to manage well. The following belay methods are sometimes used: belaying around horns, unanchored and anchored sitting belays, slings around horns, placed pro.
- Belayed climbing with protection for the leader – as climbing gets steeper and more exposed, the leader places intermediate protection. The objective is to protect both leader and second(s) from injury in case of a fall. Once the leader starts placing protection, the belayer should be anchored.

Protective systems on snow and ice are also described in *Alpine Climbing*:

- Moving together on snow, roped but unbelayed (preparing in advance for more difficult terrain, short-roping on snow slopes, moving on ridge crests)
- Unanchored belays on snow (terrain belays, unanchored sitting belays in soft snow, standing ax belay)
- Anchored belays on snow (direct vs. harness belay, snow anchors)
- Protective systems on ice. A fall on ice, even a short one, is usually very serious.

The traditional definition of 'short-roping' is when a 'guide' (the more confident person) and a 'client' (the less confident person – either through inexperience, injury, exhaustion, or a variety of other reasons) move together over terrain that is subjectively or objectively hazardous, joined by a rope for the protection or comfort of the client. Natural protection is sometimes used or placed and artificial protection placed for added security. The 'guide' and the 'client' may move together or separately, depending on the terrain. The technique is sometimes called 'confidence roping' but should never be undertaken lightly.

Guides often move together with clients on a shortened rope. While this technique has fallen into disuse in recreational climbing, it remains an important tool for professional guides. The rope may be shortened for convenience, to move over terrain where there is little risk of falling associated with a slip, or it may be shortened for safety in areas where long ropes increase hazard or impede fast and efficient progress. Allowing a client to move unsupervised where a slip might result in injury is not an option for guides. By shortening the rope, guides can maintain adequate supervision of clients without the problems associated with too much rope in relatively easy terrain. While short-roping is often associated with a guide and client(s) moving together, in many circumstances climbing separately, protection, anchors, belays, and

various other techniques are employed. Short-roping requires extensive training and practice holding actual loads and forces in test situations as well as practice in application to accurately assess its limitations. For example, not a single case is known in New Zealand guiding history of a guide holding a client by self-arresting, once the client has fallen down a hard snow or ice slope, and the guide has lost control of the rope from the belay hand.

Another caution: After mountaineering accidents the press often comments “They were not roped up”, implying that the accident was the result of not being on a rope. Seldom one hears the comment “The accident happened because the party was roped up”. Common perception: rope = safety.

## **ACCIDENTS**

*Accidents in North America Mountaineering* provides summaries of reported mountaineering accidents on an annual basis. Also included are multi-year statistics. ‘Falls or slips on rock or snow/ice’ are by far the largest immediate causes of accidents. The most significant contributory cause is ‘climbing unroped’. The second highest contributory cause is ‘exceeding abilities’. Such causes are likely to show up in accidents on scrambling trips. Accident statistics from CMC mountaineering trips don’t appear to be readily available to trip leaders and instructors.

## **POINTS FOR DISCUSSION AND QUESTIONS TO PONDER**

1. Should we accept that a few accidents are unavoidable and that individuals who engage in activities such as scrambling in the mountains need to be aware of the risks involved and accept those risks?
2. Are there scrambling strategies that the CMC might recommend to trip leaders and instructors that would reduce those risks?
3. Could recommendations from this ad hoc committee have an impact to reduce risks on scrambling trips?
4. What additional guidelines to trip leaders and instructors might be most helpful for portions of scrambling trips done without a rope? For example: routefinding, reading the terrain, reading weather conditions, communications, modeling behavior, group pace and cohesiveness, staying on route.
5. Is there a gap in trip leader and instructor training between unroped climbing and class 5 technical climbing that the CMC should attempt to address.
6. Which roped climbing strategies, currently practiced by professional mountain guides and experienced alpinists, might be introduced to trip leaders and instructors for consideration on scrambling trips?
7. Would some or all of those roped climbing practices be perceived by trip leaders, instructors, and CMC members as having a negative impact on their enjoyment of scrambling trips?
8. Would the availability of protection such as short-roping or moving belays be helpful for introducing relative novices to scrambling in the mountains?
9. Are the current descriptions of qualifications of trip leaders for scrambling trips sufficiently clear? Are those qualifications sensible and reasonable? We need to keep in mind that we are relying almost exclusively on volunteer amateur trip leaders.
10. Are the current descriptions of qualifications for school instructors sufficiently clear? Are those qualifications sensible and realistic in view of the nature of the courses? We need keep in mind that we are relying heavily on volunteer amateur instructors.

11. Would some modifications of leadership training, as currently practiced within the CMC, be beneficial to introduce any recommended changes for scrambling trips?
12. Should the CMC try to seek a more standardized approach to leadership training such as the 'Model Training Standards for Voluntary Leaders and Instructors' advocated by the UIAA Mountaineering Commission?
13. Do CMC Groups and the State organization have the knowledge base and expertise to provide the modified leadership training?
14. Should the CMC seek assistance from professional mountain guides to provide enhanced leadership training in selected areas? Such training is not inexpensive. For example, the Colorado Mountain School offers a multi-day 'Alpine Leadership Seminar' at a cost of \$1,675 per person.
15. What communication gear might be recommended for trip leaders and/or participants to carry on scrambling trips (cell phones, 2-way radios, emergency satellite locator beacons, etc.)?
16. Are the current CMC trip classifications 'A', 'B', 'C', 'D', 'C-E', 'D-E', 'scrambling', and 'semi-technical' adequate descriptors of the likely difficulty of scrambling trips for participants and trip leaders?
17. CMC trip leaders are required to submit accident reports in the event of an accident. Should summaries of CMC accident reports be shared with trip leaders and instructors for educational purposes?

## **RECOMMENDATIONS OF THE AD HOC COMMITTEE**

The committee supports the following statement: "While additional guidelines for scrambling trips and additional leader training might prevent some accidents, one needs to balance any potential benefits with the negative effects of additional rules and regulations. One should note that even if suggestions such as those listed below were implemented, it may not be possible to prevent scrambling accidents without eliminating scrambling trips altogether. Such drastic action is not acceptable to a mountaineering club."

The ad hoc committee suggests the consideration of the following recommendations regarding scrambling trips by the Colorado Mountain Club President, the Board of Directors, and the Executive Director. Copies of this report will be sent to Group chairs with the suggestion to forward it to volunteer trip leaders of scrambling trips, and instructors and directors of CMC climbing schools. While committee members see no need for new rules for scrambling trips, an implementation of the recommendations is seen to have potential benefits .

### **1. MORE ACCURATE TRIP CHARACTERIZATION**

The CMC Activity Schedule provides information on the nature and difficulty of a scheduled trip. The letter 'E' indicates terrain with 'exposure', a hint of the possible risk. The descriptors 'scrambling' and 'semi-technical', if used, provide further indications of the likely difficulty of a climb. The brief text describing the trip provides limited additional information.

The question is: Are the trip classification, difficulty descriptors, and brief descriptions sufficient to allow members to decide whether a specific trip is suitable for them? A couple of options might be worth considering.

#### **Option 1a. More Detailed Trip Descriptions**

Leaders could help by providing additional information about the trips they intend to lead, particularly for more challenging trips. This expanded description might be provided at the time

when a participant signs up or at any time prior to the trip. Communication could be via the phone although e-mail or web postings allow effective leader-participant communication.

The committee suggests that trip leaders provide, on an optional basis, short pre-trip summaries to participants, particularly to members whom they don't know. Information provided would depend on the nature of the trip, but might include the following:

Trip logistics:

- When and where to meet
- What to bring
- Other trip logistics

Nature of the mountaineering terrain:

- Including the descriptors 'E', 'scrambling', or 'semi-technical' in the trip title, if appropriate, would be a good start.
- Brief route description, referring to a guidebook, if appropriate.
- Does the climb include short sections of class 3, or class 4, or class 5 mountaineering terrain?
- Does the trip include extended portions of class 3, class 4, or class 5 mountaineering terrain?
- Does the trip include climbing on snow or ice?
- Will the route be climbed unroped or will ropes and technical gear be carried?
- What special challenges are anticipated?

What might participants expect from the leader:

- Has the leader climbed the route before or is the route new to the leader?
- What is the leader's experience level on similar trips?
- Are the leader and/or co-leaders prepared to provide rope belays on portions of the route?
- What communication devices will the leader carry on the trip (cell phone, 2-way radios, emergency satellite locator, etc.)?

What does the leader expect from participants:

- What skills and/or are expected from participants such as hiking off trail, scrambling unroped on exposed rock terrain, climbing roped pitches as a second, leading roped pitches, climbing steep snow, self-arrest techniques in snow, etc.?
- What level of conditioning is expected from participants? One measure might be the ability to climb 1,000' of elevation gain in about 1+ hour on a good trail.<sup>(f)</sup>
- What are the special participant gear requirements such as helmet, harness, rope, technical climbing gear?
- What are the leader's expectations regarding participants staying together as a group?

(f) A more precise estimate of 'normal' uphill travel time is given in *The Mountaineering Handbook* by Craig Connally:

$$T = R/3 + C + H$$

T = time in hours

R = trail travel distance in miles

C = off-trail travel distance in miles

H = elevation gain in feet/1000

### **Option 1b. More Precise CMC Mountaineering Trip Classifications**

The CMC might consider providing additional descriptors for 'C' and 'D' trips to replace the current 'C-E', 'D-E', 'scrambling', and semi-technical' categories, as well as the rather subjective 'easy', 'moderate', and difficult' designations. One way to do this might be to add a difficulty rating, such as the one currently used for CMC ski tours or one used by the Mazamas club to grade climbs:

- 1 – May require off-trail hiking, class 2 terrain with an occasional class 3 move, ice ax use on low angle snow slopes, self-arrest
- 2 – May require off-trail hiking, class 3 rock scrambling, ice ax use on moderately steep slopes, self-arrest
- 3 – May require off trail hiking, seconding class 4 rock sections, some exposure to basic rock techniques, ice ax and crampon use on moderately steep snow slopes, self-arrest
- 4 – Ice ax and crampon use on steep snow slopes, self-arrest, belaying, rappelling, and seconding short portions of exposed rock up to easy class 5
- 5 – Routes same as 'D4', with high degree of self-sufficiency and technical proficiency, exposed terrain, may need to share high angle leads including setting anchors and belays.

Leaders could then label trips as either with just 'D' or the more descriptive 'D1', 'D2', 'D3', 'D4', or 'D5', and similarly for 'C' trips. Such a system would place less emphasis on the 'distance and elevation' indicators which are usually of secondary importance for scrambling trips. Implementing a change in trip classifications would require buy-in from Groups and subsequent formal action by the State Board. Hence, this would be a more difficult step than Option 1a.

## 2. PARTICIPANT INFORMATION

Leadership seminars advise leaders to screen potential trip participants prior to a trip. Suggested phone screening includes: describing trip details, asking personal questions about abilities, pace, conditioning, medical problems, and recent trips. However, trip leaders often admit that they are not as diligent as they should be when screening potential trip participants. Leaders tend to give members the benefit of the doubt when they explain their experience and preparation. For trips that involve scrambling components (i.e. 'C-E', 'D-E', 'scrambling', and 'semi-technical' trips under the CMC classification), it is suggested that trip leaders ask potential participants whom they don't know a more or less standard set of questions. The questions could be asked when members call to sign up for a trip or they could be sent to potential participants and returned to the leader by e-mail prior to the trip. A sample questionnaire is copied below. It might be modified, depending on the nature of the trip.

### Sample Participant Questionnaire

Name:

\_\_\_\_\_

E-mail address: \_\_\_\_\_ Phone: \_\_\_\_\_

Mountaineering climbs (CMC or otherwise) completed during the past 2 years that are of a difficulty similar to, or harder than, the trip you wish to sign up for (provide trip destination names, approximate dates):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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Mountaineering education and training (CMC or otherwise) completed (provide school or seminar name, provider, approximate dates):

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Physical conditioning. How long do you estimate it takes you to climb a distance of 2 miles on a good trail with 1,000 feet of elevation gain with a light pack?

\_\_\_ 45 minutes      \_\_\_ 1 hour      \_\_\_ 1.5 hours      \_\_\_ 2 hours      \_\_\_ 2.5 hours

Medical condition that the leader should be aware of:

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### 3. A FIRST STEP - MODIFICATION OF MOUNTAINEERING LEADERSHIP TRAINING

In general, we believe that guidelines and rules aren't needed as much as knowledge, skill, and experience on the part of leaders, and eventually also participants. A quote from the description of the Boulder Group's new 'Alpine Rock School' (ARS) might be applied to mountaineering leadership in general: "Climbers who know how to move together roped and to belay short sections seem to fly along, while others waste hours belaying long pitches on easy ground or take risks climbing unroped or unbelayed because of lack of skill or knowledge in such areas."

The Colorado Mountain Club State organization and Groups should consider offering a mountaineering leadership course on a periodic basis. This course would be oriented towards current climbing school instructors and leaders of mountaineering trips (i.e. trips currently classified as 'C', 'D', 'C-E', 'D-E', 'scrambling', and 'semi-technical'). The purpose of the course would be to reinforce the 'hard' technical mountaineering and leadership training taught in climbing schools, review the 'soft' leadership skills covered in Group leadership seminars, and to introduce some of the tactics practiced by professional mountain guides and experienced alpinists.

Such a leadership course should focus on those mountaineering techniques that can be effectively taught to amateur leaders over a reasonable timeframe. It is not practical for most volunteer amateur leaders and instructors to attain skill levels required for professional mountain guides. Particular emphasis might be placed on analysis of terrain and conditions coupled to participant risk, strategies to keep groups climbing together, techniques such as moving belays to reduce participant risk, efficient transitioning between unroped and various roped modes of travel. The content of such a course might be modeled after *Alpine Climbing* by Mark Houston and Kathy Cosley.

A program worth emulating might be the North Face – Alpine Club of Canada leadership courses which are designed to provide advanced training for the club's amateur leaders in the sections (similar to CMC Groups) and amateur leaders on the club's national outings. These

courses are aimed at members who already have considerable climbing, mountaineering, and/or ski mountaineering experience, have taken some related courses, and are active leaders.

At least initially, a portion of the instruction in leadership courses may have to be provided by professional mountain guides. This would add to the cost of the courses. However, the fact that CMC trip leaders and instructors of scrambling trips tend to have completed CMC climbing schools should help to streamline the leadership course. Material already covered in CMC schools won't need to be repeated. To assist with the cost of a leadership course, Groups may wish to consider subsidizing a portion of the cost for volunteer leaders and instructors. It might be advantageous to offer such a course as a collaborative effort between Groups and possibly even the State organization. A 'train-the-trainer' approach to a mountaineering leadership course could be cost-effective. Leaders and instructors who have completed the course and have acquired the needed skills could take part in subsequent courses to train others.

Another option would be for amateur volunteer leaders to increase their skill and experience levels by enrolling in a variety of leadership courses offered through guide services. As costs of this type advanced education are substantial, the State Board and Group councils might consider ways to support such leadership training financially.

#### **4. A SECOND STEP - MODIFICATION OF BASIC MOUNTAINEERING SCHOOL CURRICULA**

Students enrolling in CMC climbing schools tend to start with at least some basic hiking and climbing experience on their own, such as climbing some of the less challenging 14ers. They are mostly accustomed to climbing unroped in such terrain. Some enroll to build their confidence in mountaineering terrain. Courses such as basic mountaineering cover the individual skills of moving on rough terrain such as talus, rock, soft and hard snow. Team skills tend to focus on climbing roped pitches and rappelling. Many BMS graduates go on to climb Colorado 14ers and 13ers, with CMC groups or on their own, usually unroped, and often don't use the 5<sup>th</sup> class climbing techniques that they have learned. Also, graduates of CMC climbing schools tend to be unfamiliar with roped climbing other than belayed full pitches with belay and intermediate anchors. Hence, they sometimes view techniques such as 'short-roping' or 'lowering' as tedious, not fun, and unnecessary and might well react with skepticism to a trip leader who would want to practice such techniques on scrambling trips.

##### **Option 4a. Modification of Basic Mountaineering Schools**

One option that Groups and Basic Mountaineering Schools should consider would be to modify their curricula, perhaps on a trial basis, to include a subset of alpine techniques as outlined in *Alpine Climbing* and practiced by professional mountain guides – those techniques that could be practiced by amateur leaders without extensive training and experience. In particular, it would be helpful on scrambling trips if graduates of basic mountaineering courses would be familiar with moving on a shortened rope, moving belays, lowering from an anchor, transitioning between modes of travel, etc., if and when practiced by leaders on scrambling trips. Such modifications could be introduced into the schools once the school instructors themselves have had a chance to participate in a leadership training course or have acquired the appropriate training in other ways. It is worth noting that the Boulder Group has already taken a step in that direction with the new 'Alpine Rock School' (ARS).

##### **Option 4b. A new Alpine Scrambling Course**

Another option that Groups may wish to consider might be to offer a course similar to the 'Alpine Scrambling Course' of the Mountaineers club. Alpine scrambling is described as bridging the gap between hiking and technical mountaineering and usually covers 3<sup>rd</sup> class

terrain, on routes which may cross steep rock or snowfields, but which usually don't require a rope. Many challenging Colorado peaks would be accessible to members who have acquired such skills that fall somewhere in between skills learned in the CMC Wilderness Trekking School (WTS) and the Basic Mountaineering School (BMS). An alpine scrambling course might be appropriate to those wanting to go beyond WTS but who are not interested in learning 5<sup>th</sup> class technical climbing techniques.

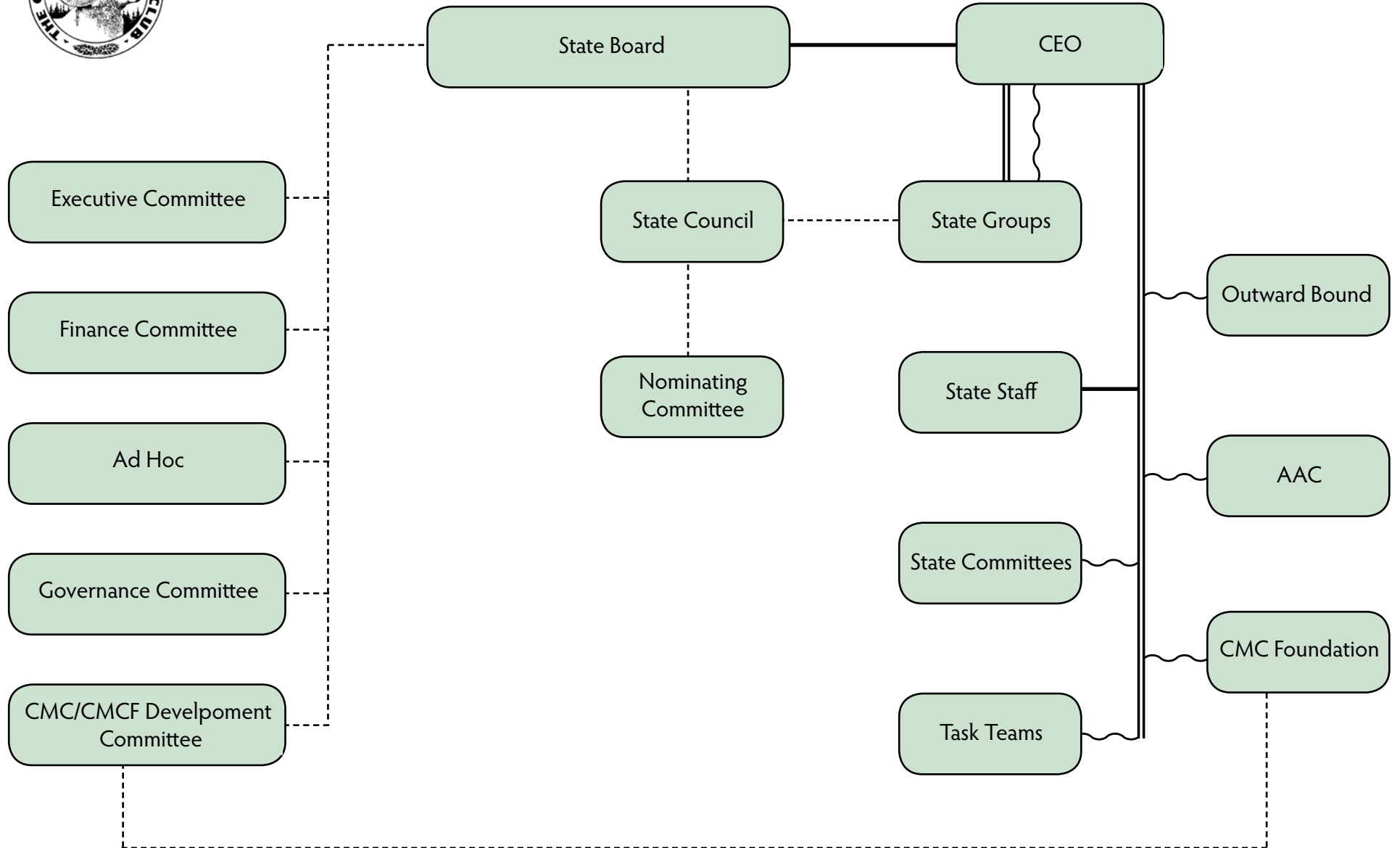
## **5. LEADERSHIP DEVELOPMENT**

CMC Groups over time have implemented leadership development programs to varying degrees. Most of the leadership development that occurs in Groups for trip leaders and school instructors tends to be informal. A Leadership Taskforce was recently formed at the CMC state level. Its purpose is to provide expertise and resources for outdoor leadership training development to be implemented throughout the CMC. This multi-year project will eventually encompass leadership for trips and outings, Adventure Travel, youth and families, and school instructors. The goal is to have state-of-the-art training for all leaders in the CMC, regardless of their geographic locations or the types of activities that they lead.

The terrain for scrambling trips tends to fall between relatively easy terrain where the great majority of climbers would not wish to rope up and terrain where technical climbing using ropes, protection, and a climbing protocol is appropriate. In such intermediate 'scrambling' or 'semi-technical' terrain, trip participants depend more on the trip leader's judgment and experience to make decisions than for terrain that is clearly on either side of the spectrum. Hence, leadership training is particularly important for scrambling trips. The committee supports the goals of the Leadership Taskforce and hopes that a leadership development program evolves from this effort that includes leadership support for scrambling trips.



*Organization Chart - January 2009*



## Attachment #2

### Colorado Mountain Club Organizational Chart narrative January 12, 2009

\*\*\*Sections that needs to be further refined by State chairs and staff. A draft is included in this document to show intent and direction.

#### Purpose and audience

The **purpose** behind the organization chart is to:

- Clarify roles for everyone involved with the CMC. This helps to streamline work, and empower people to do their work.
- Define authority and responsibility.
- Reflect the governance role the board undertook in 2005. A nonprofit board has specific responsibilities they need to fulfill. A volunteer board cannot provide the day-to-day support needed by various customers.
- Give State Groups and state committees more support.
- Delineate the support given to the program beneficiaries.
- To define the administrative units within the organization.

#### Audience

Everyone in the organization, including board members, members, Groups, state committees, etc.

#### Key

*Supervisory.* Oversees or directs people in their activities.

*Advisory.* Provides suggestions and informs

*Accountability.* Responsibilities, expectations, turns reports into, who do they go to for support or mediation first. See the list for CEO and Groups

*Collaboration.* To work together on efforts of interest to all, working towards mutually acceptable solutions.

## FAQ

### *Isn't the board removed from the members?*

- On key overarching issues, the board seeks info, as appropriate from everyone. An example: for the strategic plan, input was sought from members, staff, groups, state committees.
- Any Group, staff member, individual members, or state committee may propose or amend a policy. The proposal would go through the governance and policy board committee before coming before the board.
- Board members are encouraged to attend the State Council meetings, which was designed for dialogue with the Groups.
- The board receives regular summary reports from the Executive Director.
- Board meetings have a member comment period.
- All board members are individual members in a local group. Many board members are also involved on their Group level.

### *What is the relationship between the CEO and the Groups?*

The Executive Director (ED) is the Chief Executive Officer of the CMC, and is thus the Board's agent for managing the entire CMC organization. The ED is responsible to the Board for management of the entire organization in a manner consistent with the CMC Constitution, Bylaws and Board approved policies (Applicable CMC Authorities). Within the scope of the ED's function, is to assist the Groups in the management of their affairs, also in a manner consistent with Applicable CMC Authorities. The Groups have an independent responsibility to manage their affairs consistent with Applicable CMC Authorities. The ED and the Groups are expected to work collaboratively with each other in managing all collective CMC affairs consistent with Applicable CMC Authorities.

The ED (or the ED's designee) serves as the communications hub between the statewide organization and the individual Groups. To the extent that any Group needs assistance from the state organization, that assistance is managed through the ED (or the ED's designee). The statewide organization has an affirmative duty to provide assistance to each group as is appropriate and necessary, subject to a limitation of available resources. The ED is responsible for managing that assistance.

## Composition and Responsibilities

### Groups \*\*\*

Our regional Groups are the heart and soul of the Colorado Mountain Club. They provide service to the member at the local level.

“In any city, town, or locality, one or more Groups of the Club may be organized, subject to the approval of the State Board of Directors. Each Group shall be managed by a Group council composed of Group councilors. Each Group shall have its own officers. Each Group may adopt its own constitution and by-laws which shall state the size of the Group council, the method of selecting Group councilors and other rules pertaining to the local management of the Group. Such constitution and by-laws shall be consistent with the State constitution and by-laws.” (CMC Constitution Article III, section 1)

- a. Organizes, manages and selects trips, classifying the difficulty, and submitting for state publication (paper and web)
- b. Communicates with members, which may include a newsletter
- c. Handles member inquiries and potential new member inquiries
- d. Offers programs to members and potential members
- e. Offers trainings and schools to members. Sets the prices.
- f. Ensures that all state policies & procedures are followed
- g. Develop and carries out local publicity
- h. Oversees that safety is maintained
- i. Maintains local archives
- j. Maintains Group web site (if applicable)
- k. Selecting, supervising and if necessary, releasing leaders
- l. Classifies members (if applicable)
- m. Handles many local grievances and problems.
- n. Council
  1. Manages Group's business affairs
  2. Determine council structure and election process
  3. Takes minutes of all council meetings and makes them available to all.
  4. Keeps the state office informed of council member names and contact info
  5. Selects State Council representative
  6. Sets Group dues (in contract, the Board sets Statewide dues, which currently are \$45)
  7. Determines Group rules and standards (in contrast, the Board determines state-wide policy)
  8. Determines Group budget and financial decisions for Group
  9. Determines the annual plan of work of the Group (in contrast, the Board does the strategic plan)
- o. Collaborates with staff on (so efforts are coordinated and not duplicated, consistent messaging, and support can be given)
  1. Interface with local advertisers

2. Fund raising
3. Some local grievances and problems
4. Conservation projects
5. Lobbying
6. Securing appropriate forest service permits
7. Submitting Group financial documents to state

p. State Groups are not authorized to acquire or sell an interest in real property.

### **State Committees \*\*\***

Determines and advises operational decisions that affect multiple Groups, all members, and other program beneficiaries, such as

- a. Classification of trips
- b. Planning and leading state-wide, national, and international trips open to all members
- c. Advising of web needs
- d. Leadership standards for trip leaders
- e. Advising the CMC press
- f. Advising about the naming of Colorado peaks

### **State Council**

The connection between the board and Groups.

*Composition* (from the CMC Constitution)

- a. One member selected by each Group of the Club by a process determined by each Group;
- b. All outgoing Board members from the previous year including outgoing Officers of the Club if applicable; and
- c. Up to five representatives from Club committees as designated in the Bylaws of the Club, and selected by the board.

*Responsibilities* (from bylaws)

- a. Elect board of directors
- b. Encourage communication and cooperation among the Groups of the Club and between the Groups and the state organization.
- c. Advise the Board on policy issues and Group concerns.
- d. Periodically review the goals and objective of the club consistent with the purpose of the Club as noted in its mission statement
- e. Review and recommend changes in the programs of the Club consistent with its mission.
- f. Review and evaluate the overall performance of the board.
- g. Recommend long-term goals for state committees.
- h. Select the location and make arrangements for the Club's annual meeting with the advice and consent of the president.

## **Nominating Committee**

Responsible for the nominations of future board members. This committee evaluates the board's composition and identifies needs. The Nominating Committee then compiles a list of names who fit the needs of the board and who can assist in the achievement of the organization's strategic plan. The Chair of the Nominating Committee should have a broad knowledge of the community to reach out to appropriate people to fill board positions. (Nonprofit glossary)

### *Composition (from the CMC Constitution)*

- Five Club members including its chair.
- At least two of the nominating committee's members shall be current Board members
- At least two members shall be neither Board nor State Council members.

### *Responsibilities*

- The nominating committee performs in-depth work that the State Council usually does not have time for.
- Usually a several step process is undertaken. A basic process
  1. Establish the context
  2. Identify organizational needs, including an assessment of what the board and club needs to fulfill its mission.
  3. Solicit individuals through general announcements
  4. Develop and carryout a plan to target recruitment
  5. Evaluate incumbents
  6. Conduct personal interviews
  7. Confirm the slate

## **State Board**

“The Board of Directors shall have and exercise the corporate powers prescribed by law. Its primary functions shall be to make policy and to manage the resources of the Club in a sound manner. The Board of Directors shall further determine the general, program, and financial policies and shall have the power to carry out any other functions which are permitted by law or by the Constitution.” (CMC Bylaws Article III, section 1)

### *Composition (from the CMC Constitution)*

- a. Fifteen Directors selected by the State Council
- b. The Officers of the Club (4)
- c. The Board shall consist of members representing at least seven different Groups.
- d. The presiding officer is the president.

### *Responsibilities*

#### a. Article III, CMC Bylaws

- Establish, review, and approve changes in the programs of the Club consistent with its mission.
- Oversee and approve the budget of the Club and establish policy guidelines for the management of the endowment, all investments, and major fundraising efforts.
- Authorize the purchase, management, and sale of all land, buildings, or major equipment for use of the Club.

- Authorize the construction of new buildings and major renovations of existing Club buildings.
  - Authorize on behalf of the Club the incurring of debts and securing thereof by mortgage and pledge of real and personal property both tangible and intangible.
  - Authorize any changes in membership fees and all charges within the Club.
  - Authorize Officers or agents of the Club to solicit and/or accept gifts or bequests on behalf of the Club.
  - Appoint and remove the Executive Director on such terms and conditions including without limitation, terms relating to compensation and performance as the Board may deem advisable.
- b. Establishes board policy
  - c. Oversees the liability and risks for the organization
  - d. Establishes the strategic plan for the state
  - e. Participates in fundraising, in alignment with state committee and staff

In general, the Ten Basic Responsibilities of Nonprofit Boards

1. Determine the organization's mission and purpose.
2. Select the chief executive.
3. Provide proper financial oversight.
4. Ensure adequate resources.
5. Ensure legal and ethical integrity and maintain accountability.
6. Ensure effective organizational planning.
7. Recruit and orient new board members and assess board performance.
8. Enhance the organization's public standing.
9. Determine, monitor, and strengthen the organization's programs and services.
10. Support the chief executive and assess his or her performance

Reference. Richard T. Ingram, The Ten Basic Responsibilities of Nonprofit Boards (BoardSource 2003). From <http://www.boardsource.org/Knowledge.asp?ID=3.368>  
 Accessed January 6, 2009.

### **CEO/Executive Director**

Manages and directs the operations of the Club.

#### *Responsibilities*

- a. See Article IV, Section 5, CMC Bylaws
  - The Executive Director shall be the chief executive officer of the Club.
  - Subject to the supervision of the Board of Directors, the Executive Director shall carry out and execute the policies of the Club as adopted by the Board.
  - The Executive Director shall have the authority to manage and direct the operations of the Club, including the power to sign such papers as may be

required by that office or as instructed by the Board of Directors, and the power to appoint, supervise and discharge the professional staff of the Club, and the responsibility to coordinate and manage services to the Groups.

- In this connection, the Executive Director shall be authorized to incur expenses in accordance with the approved budget; shall make such reports and recommendations to the Board of Directors at Board meetings concerning the work and affairs of the Club which are desirable for their information and guidance; shall build partnerships and create collaborations within the community and business sector; and shall perform such other duties as are incident to the office of the Executive Director.
- The Executive Director shall be an ex officio non-voting member of all Board and state level committees and advisory councils.

b. Groups

- Provides educational and training support for Group Councils, Sections, and Schools
- Communicates and implements board policies and actions that affect Groups, such as safety, leadership and finance
- Counsels Groups as requested.
- Coordination with matters defined in Group section
- Provides support for problem solving for Groups issues and concerns

c. Manages and supervises lobbying



## Glossary

**Board Committee.** Smaller decision-making groups that work on one specific area of governance. Because committees may also include non-board members, committees are also a means of expanding input and decision-making. They provide a means for delegating tasks and expertise efficiently. These are on-going, standing committees. Committees are Executive Committee, Finance Committee, Joint Development Committee, and Governance and Policy Committee. Members consist of board members, community members, and individual governance volunteers. (Nonprofit glossary with additions)

**Board Ad Hoc Committee.** Committee established to address a specific project, usually with an end date, i.e. a task and time specific work group. (Nonprofit glossary)

**Bylaws.** A document stating the rules of internal governance for a corporation as adopted by its board of directors. (Nonprofit glossary)

**Constitution.** Foundational document establishing fundamental structure of the organization.

**Council.** Each Group has their own council to manage their Group affairs. The composition and responsibilities are determined by the Group's constitution and bylaws.

**Goal.** The end results you are seeking. Determined by the board with broad input from board, staff, State Council, and members. (CMC strategic planning process)

**Governance.** The structure and policies for decision making which include board, staff, and constituents. Governance, in the nonprofit sector, refers to the actions of the board of directors of an organization with respect to establishing and monitoring the long-term direction of that organization. (Nonprofit glossary)

**Governing Board.** The legally-required governance body that creates the vision, mission, values, and policies for the organization and makes sure that they are properly understood, followed and implemented. Also, financial oversight is one of the key responsibilities of all nonprofit boards. (Nonprofit glossary)

**Objective.** The measurement that shows you and others that you are effectively moving toward achieving the goals." There are several objectives for each goal. Determined by the board with broad input from board, staff, State Council, and members. (CMC strategic planning process)

**Operations.** Short term strategy, tactical. Planned and carried out by operational volunteers, Groups, state operational committees, and staff.

**Plan of Work (tactical plan).** Written by each Group, state operating committee, and staff, covering 1-2 years. It focuses on the "methods" or the who, how, when and where. Using the Goals and objectives, strategies and tactics are written. (CMC strategic planning process)

**Policy.** A governing principle pertaining to goals, objectives, and/or activities. It is a decision on an issue not resolved on the basis of facts and logic only. Policies are binding on all components of an organization. (modified from Nonprofit glossary)

**President.** This board member chairs board meetings, provides board leadership in fundraising, monitors financial planning and reports, encourages the board's role in strategic planning, and appoints committee chairs. The CEO reports to the Board and is evaluated by the president and Executive Committee. The CEO and the president together provide leadership in achieving the organization's mission. (Nonprofit glossary, modified by CMC Bylaws)

**\*\*\*Program Beneficiaries.** Populations served directly and indirectly include, but not limited to: individual members, non-members participating in activities, general public, at risk youth, conservation (needs to be defined such as agencies, etc.), organizations such as the US board on Geographic Names, etc.

**State committee.** A committee that operates on the state level to carry out the work of the organization. It consists of council members, individual members, community members, and staff. Committees are: safety and leadership, library, conservation, Toponymics, etc.

**Strategic plan.** The written, broad plan to guide the state CMC organization. Written by the board with broad input from board, staff, State Council, and members. It focuses on “what matters most” or the whether, what and why. The plan consists of the vision, mission, values, goals, and objectives. (CMC strategic planning process)

**Strategic Planning.** A complex, ongoing, and future-focused process of organizational change based on trends and analysis of internal and external data. Strategic planning aims to change the way an organization thinks and operates by creating a learning organization. (Nonprofit glossary)

**Strategy.** What you are trying to accomplish; it includes a way to measure your accomplishment. Determined by Groups, staff, and state committees. (CMC strategic planning process)

**Tactics.** Specific activities you will do. Determined by Groups, staff, and state committees. (CMC strategic planning process)

## **Resources**

CMC bylaws and constitution

CMC member handbook, 2002

CMC strategic planning work, [http://home.att.net/~wwhyman/7\\_1cmc/](http://home.att.net/~wwhyman/7_1cmc/)

Nonprofit glossary <http://www.npgoodpractice.org/Glossary/>

### Attachment #3

## **DEVELOPMENT COMMITTEE: COLORADO MOUNTAIN CLUB & COLORADO MOUNTAIN CLUB FOUNDATION ----- DESCRIPTION**

### **Function:**

The purpose of the Colorado Mountain Club & Colorado Mountain Club Foundation Development Committee (hereafter referred to as "committee") is to work with the board of directors of both organizations, executive director/CEO, and development director to sustain and improve the immediate and long term financial solvency of the organizations.

### **Accountability:**

The primary accountability of the committee is to the CMC and CMCF boards of directors and the committee shall provide quarterly reports to the two boards.

### **Duties:**

- 1) works with development staff in efforts to raise money per the annual development work plan approved by the executive director/CEO.
- 2) takes the lead on selected outreach efforts.
- 3) takes responsibility for involving and providing training for all board members of both organizations in fundraising.
- 4) with the executive director/CEO and development director, takes responsibility for monitoring fundraising efforts to ensure that ethical practices are employed. The committee communicates as needed with staff regarding appropriate and timely acknowledgment of donors.
- 5) provides advisory oversight, under direction of the executive director/CEO, for fundraising done by Club departments and the Foundation to ensure that redundant and potentially competitive fundraising efforts are eliminated.
- 6) each committee member will make an annual gift to either organization that will be understood to be significant in terms of the personal resources that the person has available.

### **Qualifications for committee service:**

The chair and other committee members should have a history of involvement with either organization that generates respect from members of the boards of directors. The chair and committee members shall have the organizational skills to assist the development director in involvement of other volunteers in the fundraising processing, and the leadership stature to motivate volunteers. The chair should have funds development skills; executive presence skills; and stature to interact successfully with potential donors and individuals.

### **Composition:**

- 1) the committee is composed of up to 12 members, with up to four each appointed by the boards of the CMC and CMCF. Up to four additional members with past experience on one of the boards or in development activity can be appointed by the chair and confirmed by the committee. Current or past service on one of the two boards is preferable for committee membership, but is not required.
- 2) the chair is selected by the committee for a two year term from among its membership and confirmed by both boards. The chair may serve multiple terms, but not more than two in succession.

- 3) the executive director/CEO and development director shall serve as ex-officio members of the committee. Other Club members may work with the committee, but shall not be voting members of the committee.

**Chair:**

The chair of the committee provides leadership for the committee and the rest of the two boards in the organization's fundraising efforts. The chair reports directly to the presidents of both boards and works closely with the executive director/CEO and the development director.

12/31/2008

## Attachment #4

### Backcountry Snowsports Alliance

#### Our Mission

The Backcountry Snowsports Alliance represents winter backcountry recreationists by advocating the creation, preservation, and management of non-motorized areas on public lands. We work to preserve backcountry areas for quiet human-powered use, promote winter backcountry safety and ethics, and cooperatively resolve conflicts among backcountry users.

The BSA is a Colorado not-for-profit organization. [We are](#) a coalition of backcountry skiers, snowshoers, and snowboarders that strives to

- Promote dialogue among user groups
- Communicate with members to learn their interests and educate them on issues through this website and the [BSA newsletter](#)
- Back smaller groups and BSA Chapters to promote solutions to local issues
- Inventory areas in [Colorado](#) and identify areas in need of our work
- Work with land managers and lawmakers
- Attend [meetings](#) and advocate for non-motorized interests
- Network with other non-profits
- Promote safety in the backcountry through regular events such as the [backcountry skill series](#)

#### Where We Work - the Colorado Backcountry

We represent the interests of non-motorized winter backcountry users -- skiers, snowboarders, snowshoers, and others -- in the Rocky Mountains. We try to get areas designated as non-motorized in the winter so that you can enjoy your winter sport without the noise, exhaust, or danger of encountering a motorized vehicle. Much of our work so far has been concentrated where non-motorized interests often collide with motorized interests: Colorado's high passes traversed by roads.

Since 1988, the BSA has been active in the [Vail Pass](#) area, where an equitable management plan is now in place and separation of use is now enforceable. [Steamboat Springs](#) is home to the BSA's second chapter, which was formed in February 1998 and works on issues of concern in the Routt National Forest and in the Buffalo Pass area. Since January 2001, the BSA has been working on separation of winter use at [Wolf Creek Pass](#).

The BSA has been also been actively involved in the [White River National Forest](#) management planning process. As other forest plans are revised in Colorado, we are participating in the process to ensure that appropriate areas are being designated as non-motorized. Currently the Grand Mesa, Uncompahgre, and Gunnison National Forests (GMUG) are in the early stages of revising their plans.

Merger Exploration  
Colorado Mountain Club/Backcountry Snowsports Alliance  
10-8-08  
Clare Bastable, Conservation Director, Colorado Mountain Club

When considering a merger between any two non-profit organizations, it is of paramount importance to explore whether the mission and goals of those organizations are fundamentally compatible and if a merger would be a mutually beneficial undertaking or if it would serve only one (or even neither) of the groups involved. In the case of the Backcountry Snowsports Alliance and the Colorado Mountain Club, it appears at first glance that our missions and goals are quite closely aligned and that consideration of a merger could be a truly mutually beneficial exploration. Briefly, the fundamental compatibilities are as follows:

The Backcountry Snowsports Alliance (BSA) was organized to advocate for the creation, preservation and management of human-powered recreation on public lands in Colorado. The Colorado Mountain Club (CMC) was organized to accomplish quite the same, devoting itself to uniting those who love the Colorado Rockies or who study or seek recreation in them, and to preserving and promoting the quiet recreational experience on public lands throughout the state. Throughout its almost 100 year history, the CMC has tended to focus more on the summer side of recreation in its advocacy, although the Club does offer hundreds of human-powered over-snow trips for our members each year. Over the past several years, there has been an increasing emphasis on winter recreation advocacy within the CMC, as we work to make sure that both our summer and winter backcountry experiences are protected, and that conflicts amongst winter recreation users are resolved.

Specifically, the Conservation Department of the Colorado Mountain Club has initiated the development of a Winter Recreation Policy, which outlines a series of goals and conditions that we are seeking to achieve with our winter advocacy. In addition, we have become intimately involved in various travel management plans throughout the state that include winter recreation in their planning process, and have also hired a full time recreation planning coordinator in the Department to cover both winter and summer recreation advocacy. Bringing BSA into the Club would only give us more experience and fortitude as we move forward with our winter recreation work.

As for the mutual benefits for our members of merging, the prospects seem exciting. The Colorado Mountain Club offers over 3,000 trips to our members each year in Colorado and beyond, and we publish a quarterly magazine that is distributed to all 9,000+ members of the Club. In addition, the CMC owns the historic American Mountaineering Center in Golden, Colorado, including the state-of-the-art Mountaineering Museum, which is available to all members. We offer discounted classes including first aid, avalanche awareness, and basic and high altitude mountaineering, to name just a few, and we offer almost a hundred years of experience in advocating for human-powered use in the backcountry.

As for benefits to the CMC, merging with the Backcountry Snowsports Alliance could infuse a powerful history of winter advocacy and knowledge of winter issues into our organization, providing an important boost to the work that we have begun to take on over the past few years. In addition, it could help to bring new members and new energy into our organization – members that seem to represent a slightly different demographic and cover a complementary geography. Also, it could afford us better relationships with corporations that the BSA has partnered with over time, as well as organizations such as Tenth Mountain and Summit Huts Association, among others.

From this and other initial exploration, it seems that further discussion of joining forces may be a worthwhile venture for both organizations involved.

BEFORE THE BOARD OF DIRECTORS OF  
COLORADO MOUNTAIN CLUB

RESOLUTION NO. 2009- 01

RE: QUIT CLAIM OF REMAINDER OF FRACTIONAL INTEREST ON PROPERTY UNDER US FOREST  
SERVICE SPECIAL USE PERMIT

RECITALS

1. The CMC has been informed by an attorney for a decedent's estate, that the CMC has been devised a remainder interest in a cabin (Subject Property) where the Decedent owned a 70% fee interest, the cabin is on US Forest Service property and operated under a residential cabin Special Use Permit (SUP), and a life estate in the Decedent's 70% interest has been devised to a third party.
2. The same attorney reports that he has discussed the possibility of the CMC holding title to the Subject Property under the terms of the SUP with the US Forest Service, and reports that the US Forest Service claims that such an ownership would be inconsistent with the terms of the SUP, and thus would not be permitted.
3. The Decedent's estate attorney has requested that the CMC quit claim its remainder interest in the Subject Property to the estate, so that the estate can unify the life estate with the remainder in the Subject property, so that it can be sold. Until the life estate and remainder are combined, the Decedent's estate's interest in the Subject Property will be a serious challenge to sell.
4. The CMC Executive Director has conferred with legal counsel as to the wisdom of the transaction, and the potential challenges of dealing with a remainder in a split co-tenancy where the CMC would only hold a 70% remainder interest of a cabin, where a life estate of that same interest is held by a third party. The Executive Director's conclusion is that it is in the best interest of the CMC for the CMC not to accept the remainder in the 70% life estate of the Subject Property, and to thus quit claim its interest in the Subject Property, as requested by the attorney for the Decedent's estate.
5. Article III, Section 1 of the CMC Bylaws states that the powers of the State Board of Directors, which include the following:
  - ...
  - Authorize the purchase, management, and sale of all land, buildings, or major equipment for use of the Club.
  - ...
  - Authorize Officers or agents of the Club to solicit and/or accept gifts or bequests on behalf of the Club.
6. The Board desires to authorize its officers and Executive Director to execute the quit claim deed of the CMC's interest in the Subject Property in a manner consistent with the CMC Bylaws.

RESOLUTION

The CMC State Board of Directors hereby authorizes its officers and/or its Executive Director to execute the quit claim deed as attached to this Resolution.

Director \_\_\_\_\_ seconded the motion for the adoption of the foregoing Resolution.  
The motion was adopted by majority vote of the quorum present.

Dated: January 24, 2009

\_\_\_\_\_  
President

\_\_\_\_\_  
Secretary