Recommended Practices
For Effective Management of Bulk Message Traffic Originations

Comments due by May 1, 2018

Notice: This is a proposed policy only. We are asking the traffic community to offer its opinion about this proposed policy. All stakeholders are encouraged to offer their input. This may include opposition, support or suggestions for modification.

Please submit your comments by no later than May 1, 2018 to:

info@radio-relay.org

<p align="center">- **Proposed Policy -**
Recommended Practices for Management of Bulk Message Traffic</p>

The origination of bulk message traffic provides a variety of benefits, including:

1. Bulk traffic exercises Amateur Radio traffic networks.
2. It provides an operating challenge, particularly for those who are new to traffic work.
3. It introduces new radio amateurs to traffic networks and public service communications.
4. It serves as a public relations tool.

Bulk traffic can also be problematic if managed incorrectly. Obsolete addresses, irrelevant message content or messages addressed to deceased, incapacitated or inactive radio amateurs creates problems for volunteers attempting to deliver messages. The result is often negative experiences, which are harmful to the very necessary requirement for volunteer retention.

These recommended practices define the type of bulk traffic that is generally considered beneficial by the broader traffic community. Bulk traffic that does not meet these requirements should be considered questionable. If in doubt, an operator wishing to originate bulk messages traffic should consult with his peers to determine if there are concerns regarding content or purpose.

<p align="center">**Recommended Criteria for Bulk Originations:**</p>

A catalyst should be present:

A bulk message should be originated based on a *recent action of the addressee*. Examples include, but are not necessarily limited to:

- The addressee has recently joined a club or organization.
- The addressee has recently obtained a radio license.
- The addressee has attained an operating award.
- The addressee has performed a task or function worthy of a "thank you" or other recognition.

The key to understanding these criteria is the fact that *the addressee's actions define the purpose of the origination*.

Inaction should NOT be the cause for origination:

A bulk message should not be originated because the addressee *failed to act* in some manner. In such cases, the addressee may have failed to act for any number of reasons up to and including death, incapacitation or the like. Volunteers delivering such messages may encounter resentment or even anger from a spouse, children or other family members of a deceased or incapacitated radio amateur. Examples of inappropriate bulk traffic includes:

- A failure to renew one's Amateur Radio License.
- A failure to renew a club or organization membership.

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An exception to this guideline may be made if one has *verifiable, personal* knowledge that the addressee is neither deceased nor incapacitated as well as verifiable, personal knowledge that the inaction is not based on a purposeful choice.

Best Practices for Bulk Originations:

Research and discussions with a wide variety of radio amateurs indicate that successful bulk originations meet the following criteria:

1. The addressee has engaged in a recent action that defines the purpose of the radiogram.

2. The address, telephone and e-mail contact information have been obtained from a source that is known to be generally reliable. Ideally, this data would be obtained from the addressee himself or via an up-to-date club or organization membership database or a timely registration process.

3. The message is timely. It is originated at a time that closely follows the actions of the addressee, which define the purpose of the radiogram.

4. The message serves multiple purposes. For example; a message addressed to a newly licensed radio amateur achieves several purposes:

   ➢ It welcomes the radio amateur and creates a fraternal bond with the broader Amateur Radio Community.
   ➢ It allows the delivering operator to invite the radio amateur to local club or EMCOMM group meetings.
   ➢ It introduces the radio amateur to the concept of an International traffic network.

5. The message serves a constructive purpose, such as acknowledging a conference registration, club membership application, contest results submission, or a similar action on the part of the addressee.

6. Bulk originations should be coordinated. While one or perhaps even two messages pertaining to the same subject may be welcome, several are likely problematic. It is recommended that those wishing to originate bulk messages request coordination from RRI Staff to prevent duplication of efforts and conflict of interest. Some examples of bulk traffic that may require coordination includes, but is not necessarily limited to:

   • New ham greetings.
   • License recently renewed congratulations.
   • New vanity call sign congratulations.

7. A simple request to originate bulk traffic will trigger a coordination effort by RRI staff. This request may be made by sending an e-mail with the subject line "bulk traffic coordination request" to: info@radio-relay.org

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Database Reliability:

For the purposes of this policy, on-line telephone number directories are generally considered unreliable. Furthermore, as an increasing number of individuals transition to cellular mobile telephone service, such data will become increasingly inaccurate.

Databases maintained by clubs and organizations with which the addressee is affiliated are generally considered reliable sources.

While a telephone number is a preferred component within a radiogram address, the originator of bulk traffic may find that e-mail addresses provide a better alternative than a potentially obsolete telephone number culled from a public on-line database. E-mails provided by the addressee may be found on Amateur Radio websites offering searchable call sign databases.

If in doubt about the reliability of a source, it may be best NOT to originate the message.

VEC Data Harvesting:

Amateur Radio is fundamentally a grass-roots organization. It is in the interest of all active radio amateurs to encourage the integration of new licensees into the local radio community.

Radio Relay International offers a standardized form, available for download at its web site, which can be printed and distributed at VEC sessions. Those who pass the exam are encouraged to complete and submit the RRI form. The data is then provided to RRI, which will generate a "welcome message" from a volunteer located elsewhere in the United States, Canada or overseas.

The purpose of the message is to establish a connection with the local Amateur Radio community when it is delivered. The delivering radio operator uses the radiogram delivery process to invite the new ham to a local club meeting, EMCOMM group activity or similar event. He can also invite the new ham to call back with questions about Amateur Radio.

This method offers a few advantages:

1. The data is provided by the addressee himself.
2. The addressee is anticipating the radiogram delivery.
3. The addressee will likely obtain the radiogram before he even learns of his call sign.
4. An opportunity to bring the new ham into the local community is assured.

Managing System Circuit Capacity:

The RRI Digital Traffic Net offers significant circuit capacity advantages. It is easy to upload large quantities of bulk traffic to the system. However, it is important to remember that traffic is often be transferred to manual-mode networks utilizing voice or CW methods.

Careless use of DTN facilities can result in an excessive traffic load at the state/local net level, particularly when multiple bulk originators are active at the same time. While a high traffic load may be appropriate

for testing the system during a disaster exercise, repeated high traffic loads during <u>routine</u> nets are certain to damage volunteer morale.

Five recommended guidelines for managing circuit capacity follow:

1. By originating bulk traffic using manual mode nets, one will inherently limit the quantity to a manageable level.

2. When originating traffic via DTN, consider limiting the quantity of messages destined for any one state. Five to seven messages per state is a reasonable maximum number for routine bulk traffic from a single originator.

3. Handling instructions, such as HXC, should be used judiciously. Service replies reporting date and time of delivery can be useful for statistical analysis, however, such data is not always necessary. When possible, *the station delivering the message* should also generate the service message reply to yield maximum training benefits. This is particularly true in the case of new traffic handlers.

4. In the case of bulk traffic, a service message should only be necessary if a delivery problem arises.

5. Remember that service messages, when necessary, should be addressed to the station of origin *<u>at its location</u>*. This may differ from the place of origin on the original message, which is associated with the individual whose signature appears on the message.

<u>Balancing Networks</u>:

Traffic is the life-blood of a volunteer-based traffic system. Bulk originators are encouraged to provide originations via both the manual mode system and the digital traffic net. This ensures training is available for volunteers utilizing both systems.

<u>Contact Information</u>:

Questions regarding this document should be submitted to the Radio Relay International Board of Directors.

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