



# **POLICIES & PROCEDURES MANUAL OF THE PROFESSIONAL SKI INSTRUCTORS OF AMERICA & AMERICAN ASSOCIATION OF SNOWBOARD INSTRUCTORS WESTERN REGION (PSIA-AASI W)**

**Latest Revision: Jan 20, 2026**

This Policies & Procedures Manual outlines operational practice and is created in conjunction with the organization's current Bylaws, Governance Policy Manual and Articles of Incorporation. Any inconsistency or ambiguity found between this manual and the bylaws or Articles of Incorporation shall be construed in favor of the Bylaws, Governance Policy Manual and Articles of Incorporation.

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## **I.** **TERMINOLOGY**

BOARD refers to the Board of Directors of PSIA-AASI W.

CHAIR refers to the Board of Directors Chairperson of PSIA-AASI W.

CEU refers to Continuing Education Units.

ED STAFF refers to the Educational Staff of the Corporation, hired to provide products, clinics and examinations to members.

MEMBERSHIP refers to all members of the Corporation in good standing. A MEMBER is an individual who is part of the membership.

PSIA-AASI or ASEA refers to the Professional Ski Instructors of American & American Association of Snowboard Instructors, a national organization.

PSIA-AASI W refers to the Professional Ski Instructors of American & American Association of Snowboard Instructors West, an independent Corporation and affiliate of PSIA-AASI.

EF refers to the Education Foundation of the Professional Ski Instructors of American and the American Association of Snowboard Instructors. The EF is a supporting organization for PSIA-AASI W.

BOARD refers to the Board of Directors of PSIA-AASI W

CEO refers to the Chief Executive Officer of PSIA-AASI W.

PRESIDENT refers to the President of the Board of the EF, as appointed by the PSIA-AASI W Board.

DELEGATE refers to the person or persons appointed by either the Chair or the President and agreed to by the other party.

SCHOLARSHIP COMMITTEE refers to the committee of the EF that is responsible for reviewing Scholarship applications and awarding EF Scholarships.

NATIONAL or ASEA refers PSIA-AASI National Organization

NON-MEMBER refers to the person or organization who is not a member of or affiliated with PSIA-AASI W.

COMMUNICATION PLAN refers to the process by which PSIA-AASI W and EF will communicate with each other.

CONTRIBUTION REPORTING SPREADSHEET refers to the "Contributions by Season" Spreadsheet located at this [link](#).

## II. CODE OF CONDUCT

### **2.1. PSIA-AASI Code of Conduct.**

On April 26, 2018, the Board adopted the PSIA-AASI Code of Conduct for all members of PSIA-AASI-W. From time to time, the code may be updated.

Deviation from this Code may result in disciplinary action up to and including the loss of the Member's credentials, National/Divisional membership, position as an officer, or position on the Board.

### **2.2. Code of Conduct Purpose.**

This Code of Conduct has been developed to help members achieve a level of personal conduct and standards of behavior that is consistent with the position and professional expectations of instructors across the country. This Nationwide Code of Conduct applies to all members, member schools and volunteers, including PSIA-AASI's Division and National board members and officers at all times that they are involved with PSIA-AASI or in a position to affect the PSIA-AASI's standing within the snowsports industry or with the general public.

### **2.3. Code of Conduct Provisions.**

1. Members shall conduct themselves in a manner that is consistent with practicing safety, risk awareness, professionalism, a high standard of integrity, self-control, and responsible behavior.
2. Members shall comply with all applicable rules and policies of their division and the association, including but not limited to their bylaws and conflict of interest policy.
3. Members shall not accept any gratuity, gift, or favor that might impair or appear to influence their professional decisions or actions.
4. Members shall not engage in conduct involving dishonesty, fraud, deceit, or misrepresentation.
5. Members shall not engage in illegal conduct.
6. Member shall not engage in harassment of any kind against a resort guest, resort employee, a member of the general public, PSIA-AASI association employees, volunteers, contractors, or another member.
7. Members shall not discriminate against any member or any other person on account of race, religion, age, creed, disability, gender, gender identity, sexual orientation, or nationality.
8. Members shall not conduct themselves in a manner which would bring discredit to the association or any division.
9. Members shall not abuse any privilege that may be extended as a result of their membership from industry partners, such as equipment manufacturers, distributors, retailers, resorts, or other professional groups.
10. Members shall not allow the use of their name or likeness in such manner as to misrepresent or otherwise mislead the public concerning any given product or service.
11. Members shall not misrepresent themselves in any way to the organization, for instance, their professional status, competence, or experience.

Deviation from this Code may result in disciplinary action up to and including the loss of the member's credentials, National/Divisional membership, or position on the Board of Directors. Review and disciplinary process begin at the regional level and move through their disciplinary due process policy.

## **2.4. Code of Conduct for Board of Directors.**

The Board is ethical, professional, and conducts itself lawfully, including proper use of authority and appropriate decorum when acting as Board members.

Accordingly:

1. Board members must avoid conflict of interest with respect to their fiduciary responsibility.
  - A. There must be no self-dealing or any conduct of private business or personal services between any Board member and the organization except as procedurally controlled to assure openness, competitive opportunity, and equal access to inside information.
  - B. The purpose of this conflict-of-interest statement is to protect the interests of our tax-exempt organization when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a director, officer, committee chair, or management employee of the organization or any entity in which the affected individual has any legal, equitable or any fiduciary interest as a director, officer, shareholder or partner.
  - C. Conflicts of interest may arise in the relations of directors, officers, committee chairs and management employees with any of the following third parties:
    - i. Competing or affinity organizations
    - ii. Persons and firms supplying goods and services to PSIA-AASI W
    - iii. Persons and firms from whom PSIA-AASI W leases property and equipment
    - iv. Agencies, organizations, and associations that affect the operations of PSIA-AASI W
    - v. Family members, friends, and other employees
  - D. Disclosures of a real or potential conflict of interest should be made to the Chair (or if they are the one with the conflict, then to the Vice Chair), who shall determine whether a conflict exists and is material, and if the matters are material, bring them to the attention of the Board.
  - E. Whenever any Board Member or person subject to this policy has a conflict of interest or a perceived conflict of interest with PSIA-AASI W, they shall notify the Chair of such conflict in writing.
  - F. The Board has determined that a real or potential conflict of interest always exists in the following circumstances:
    - i. When a voting member of the Board of Directors receives compensation, directly or indirectly, from the Corporation for services. In such a case, the Board member shall be precluded from voting on matters pertaining to that member's compensation.
    - ii. Any voting member of the Board of Directors or any committee whose jurisdiction includes compensation or performance matters and who receives compensation, directly or indirectly, from the Corporation shall be prohibited from providing information to the Board of Directors or any committee regarding compensation or performance review.

G. The areas of conflicting interest listed in the previous section, and the relations in those areas that may give rise to conflict, as listed previously, are not exhaustive. Conceivably, conflicts might arise in other areas or through other relations. It is assumed that the directors, officers, committee chairs and management employees will recognize such areas and relation by analogy.

2. Board members must not exercise individual authority over the organization.

- A. Board members' interactions with the CEO or with employees must recognize the lack of authority vested in individuals except when explicitly stipulated by the Board.
- B. Board members are not to speak for the Board except when specifically authorized by the Board to do so, and then only to repeat explicitly stated Board decisions.
- C. The Board may not speak for the CEO except when specifically authorized by the CEO to do so, and then only repeat explicitly stated CEO decisions.
- D. Board members will not publicly express individual judgments of the CEO or the performance of individual employees, other than when participating in the Board's monitoring functions.

3. Board members must respect the confidentiality appropriate to issues of a sensitive nature.

4. Board members must respect PSIA-AASI W's relationships with other industry partners.

5. A Board member aware of credible information that suggests a Board policy has been violated by the Board, a Board member, or the CEO, has an affirmative obligation to bring the concern to the Board Chair. If the Chairperson is the Chair of the concern, it should be brought to the Vice Chair.

6. If a Board member is alleged to have violated this Code of Conduct:

- A. The Chair (or Vice Chair, if the Chair is the subject of the concern) will have an informal discussion with the individual whose action(s) are questioned. If this is not successful in resolving the concern, then:
- B. The Chair will put the issue on the agenda for the closed session. The respondent Board member will be allowed to present his or her views prior to the Board determining whether or not the action violated this Code of Conduct.
- C. A Board member found by the Board (by majority vote) to have violated this Code of Conduct may be subject to subsequent censure or other Board action, as long as consistent with the Bylaws.

7. All Board members are required to sign an acknowledgement of this policy annually.

## **2.5. Code of Conduct for Ed Staff.**

In addition to the Code of Conduct established in Section 2.3 and any additional rules and policies established by the Employee Handbook, all Ed Staff will comply with the following:

1. While attending any corporate function or representing PSIA-AASI W in any way as a member of the Ed Staff you must be aware of your high visibility and act in accordance with the guidelines set forth in this manual.
2. When working at an event, in particular an EXAM, you are representing PSIA-AASI W from the moment of arrival at the area or hotel/motel, until departure from the event. Avoid any situation which could be perceived as conflict of interest or the appearance of favoritism. Even an 'innocent' relationship with an exam candidate could create an impression of favoritism.
3. You should demonstrate the highest professional standards, reflecting and teaching the philosophies of the Corporation, and positively promoting PSIA-AASI W in general.
4. Ed Staff members are responsible for the safety and functionality of the Snowsports equipment they use in the performance of their job.
5. Ed Staff members are expected to be neatly groomed, with professional attire, including the required discipline uniform (where required).
6. Using alcohol or other intoxicants while working for PSIA-AASI W is prohibited. Do not operate a vehicle while under the influence of intoxicants.
7. Smoking anywhere on the premises of an event is not allowed, unless out of uniform and in a designated smoking area.

### **III. MEMBERSHIP DUES & EVENT FEES**

#### **3.1. Individual Member Application.**

1. Any person age 16 or older may become a Registered member of the organization by completing an application form and paying required dues and fees.
2. All memberships include membership in PSIA-AASI W and PSIA-AASI.
3. Requirements for membership may change, from time to time, to remain consistent with the membership requirements of PSIA-AASI. Even in the absence of a change in this document, if PSIA-AASI implements a change, the PSIA-AASI change will take effect immediately unless the change requires an action by the Board.

#### **3.2. Individual Member Dues.**

The Annual Dues for Registered and Certified Members: \$160, consisting of \$75 Regional Dues and \$85 National Dues.

The Annual Dues for Alumni members: \$65 (\$35 National, \$30 Western).

#### **3.3. Membership Renewal.**

Membership must be renewed on or before July 1 of each year. Members may renew online.

Certified members must also meet mandatory educational requirements to maintain their level of certification, as set forth in this document.

### **3.4 Event Fees.**

The region shall establish event and exam fees and ensure that fee structures are posted on the website and communicated to member schools for budgeting purposes. Event fees shall cover the real costs of events. Event fee increases shall be proposed by the CEO in the annual budget cycle and only increases included in the proposed and approved budget may be assessed to the membership.

## **IV. MEMBERSHIP CLASSIFICATION**

### **4.1. Registered Member.**

The member must be at least 16 years old to join.

A registered member has all of the privileges and duties as set out in the bylaws.

### **4.2. Certified Member.**

A certified member may be certified as a Level 1, Level 2 or Level 3 in each and all snowsports disciplines.

A certified member has all of the privileges and duties as set out in the bylaws.

### **4.3. Alumni Member.**

Alumni member are those who have been members for 10 years or more and are not currently active in snowsports instruction but want to maintain their membership and receive National and Regional publications.

Alumni members have all of the privileges and duties as set out in the bylaws.

Alumni members are not required to fulfill annual education requirements.

Alumni members may continue to attend educational events.

Alumni members' certifications will be considered inactive and will not be listed on their membership card nor in their online member profile.

Alumni members are not qualified for certification-based Pro Deals and other benefits which are strictly for certified members.

Alumni members in good standing can reinstate their certification at any time by paying the difference for the certification membership annual rate and attending one day of education.

## V. TRANSFER OF MEMBERSHIP

### **5.1. Transfers Between PSIA-AASI Regions.**

Membership should reflect where an individual works and lives in order to ensure relevant communications and support. Members may elect at any time to relocate their membership from one PSIA-AASI Region to another. Mid-season transfers are subject to double paying regional dues (in essence paying as dual members). National dues transfer directly between Regions.

Members should consider a transfer any time they move from one region to another. Transfers ARE NOT a method for a member to circumvent their home region's policies on dues, education, etc. Increasingly, policies and assessments are identical region to region.

Certification level is nationally recognized and transferable throughout the 8 Regions.

### **5.2. Transfer Procedures Between PSIA-AASI Regions.**

Transferring IN to the Western Region

- Email your request to [memberservices@thesnowpros.org](mailto:memberservices@thesnowpros.org)
- Transfers requested after paying your membership dues and outside the membership renewal period of April-June will incur a \$25 transfer fee.
- All memberships, regardless of their transfer or beginning date, are up for renewal in June and will expire June 30th if not renewed.

Transferring OUT of the Western Region

- Contact the region you are interested in transferring into.

## VI. REINSTATEMENT OF MEMBERSHIP

### **6.1. General Reinstatement Requirements.**

The requirements for reinstatement are established by PSIA-AASI, effective February 1, 2019.

Members who have allowed their membership to lapse may seek reinstatement. The requirements for reinstatement depend on how long the membership has lapsed. While going through the reinstatement process the membership card will show "certified inactive" status until the reinstatement process requirements have been met.

### **6.2. Lapsed Less than Two Years.**

- Pay last season's missed dues & late fees
- Pay the current season's dues
- Become current on your education credit requirements (1-day/6-CEUs each season OR 2-days/12-CEUs every 2-seasons)

**6.3. Lapsed More than Two Years and Less than Five Years.**

- Pay \$210 for reinstatement
- Pay the current season's dues
- Reactivate prior certifications by earning the CEUs listed below:
  - 2-years: 18-CEUs
  - 3-4 years: 24-CEUs

**6.4. Lapsed More than Five Years.**

- Pay \$380 for reinstatement
- Pay the current season's dues
- Earn 24-CEUs within two seasons to have your former certifications reactivated
- Your original join date will be reset to your date of reinstatement

**6.5. Reinstatement as Alumni.**

- Individuals wishing to re-join PSIA-AASI as an Alumni member must have an original join date of at least 10-years prior. Alumni members will be excused from continuing education requirements and their certifications will be inactive.

**VII.**  
**CERTIFICATION & SPECIALISTS**

**7.1. Generally.**

These Policies & Procedures shall set forth the policies, procedures, and eligibility requirements for Certification and Specialists. To the extent that any information contained on the Corporation's website or other documentation published to the membership or general public contains information inconsistent with these policies and procedures, these policies and procedures shall control.

**7.2 Certification Disciplines and Levels.**

Certifications are available in the following disciplines: Alpine, Snowboard, Cross Country, Telemark, Adaptive Alpine, Adaptive Snowboard.

In each discipline, Certification is available for three levels: Level 1, Level 2, and Level 3.

The specific requirements may vary from discipline to discipline.

**7.3. Specialists.**

Specialization is available in the following areas: Children, Freestyle, and Senior.

**7.4. Development Programs**

PSIA-AASI W offers leadership and personal development and training programs which may be found on the Calendar or Events page of the PSIA-AASI Website.

## **7.5. PSIA-AASI W Members Taking Out of Region Exams**

Members in good standing may take an exam in another PSIA-AASI Region.

Partial Passes of an exam module does not automatically transfer to another region. Modular transfers between regions are only honored between regions who have fully adopted national exam operating procedures and must be preapproved by the regions involved. However, a member can return to the original region to complete the certification.

## **7.6. Out of Region Members**

Any member in good standing of any Region of PSIA-AASI is allowed to participate in a PSIA-AASI W exam or event. PSIA-AASI W will issue pins, certificates and assessment forms will be uploaded to the member's profile.

# **VIII.**

## **CERTIFICATION & SPECIALIST ELIGIBILITY & PATHWAYS**

Eligibility Requirements Apply to ALL PSIA-AASI Disciplines: Alpine, Snowboard, Cross Country, Telemark, Adaptive Alpine, Adaptive Snowboard

### **8.1. Eligibility for Level 1 Certification.**

1. Age. Instructors must be at least 16 years of age and a "Registered" Member of PSIA-AASI W to attend certification events. Prerequisites for individual certifications are addressed below.
2. Employment. In general, instructors are not required to be employed at a snowsports school to pursue certification. Members pursuing Level 1 certification who are not or have never been employed by a snowsports school are required to take an approved on-snow PSIA-AASI W Level One Preparation Course in the respective discipline.
3. Suggested Teaching Minimum. 20 hours of resort approved lessons.

### **8.2. Eligibility for Level 2 Certification.**

1. Status. A Candidate for Level 2 Certification must be a Level 1 Certified Member of PSIA-AASI W in good standing, with all education requirements met and all required dues paid.
2. Prerequisites - Any candidate for Level 2 Certification must have the following prerequisites:
  - a. Be a Level 1 Certified Instructor in the same discipline.
  - b. Be willing and able to safely perform all skiing/riding requirements
  - c. Have the professional knowledge to understand and execute all skiing/riding instructions relevant to the National Standards for Level 2 Certification.
  - d. Highly suggested prerequisites include 250 hours of resort approved lessons, 1 full season as a Level 1 Instructor and a Level 1 Specialist Certificate: Children's, Adaptive, Freestyle or Senior's.
3. Sequence of Level 2 Examination - Effective July 1, 2025: An Alpine or Snowboard Level 2 candidate must successfully complete the Online Professional Knowledge exam first. They must then register for and successfully complete both the 1-day Level 2 Ski/Ride Assessment and the

1-day Level 2 Technical Understanding and Movement Analysis Assessment. These two assessments can be taken in any order, but both need to be successfully completed before signing up for the Level 2 Teach Assessment. Any assessment modules completed during the 24/25 season must reflect a passing score in both the Ski/Ride AND the Tech/MA for the candidate to be eligible for the Teach Assessment. Anyone who successfully completed the Ski/Ride assessment prior to the 24/25 Season must additionally complete the Tech/MA assessment in order to be eligible for the Teach Assessment. Anyone who was unsuccessful in the Ski/Ride Assessment prior to the 24/25 Season, must complete both the Ski/Ride AND Tech/MA modules before being eligible for the Teach Assessment. All three assessments (Level 2 Ski/Ride Assessment, Level 2 Technical Understanding and Movement Analysis Assessment, and Level 2 Teach Assessment) must be successfully completed in order to attain Level 2 Certification. Other disciplines refer to the specific discipline details in Section 8 of this document.

4. Validity of Level 2 Ski/Ride Module Pass - Successful completion attained on or after July 1, 2025 of the Alpine or Snowboard Level 2 Ski/Ride Assessment or Level 2 Tech/MA Assessment Modules shall be valid in perpetuity as long as the member remains active and in good standing. Partial passes of Level 2 Ski/Ride or Tech/MA Modules completed prior July 1, 2025 are not valid: anyone who did not attain an overall pass in the Ski/Ride Assessment must complete both the Tech/MA AND the Ski/Ride Assessment. The Online Professional Knowledge exam is valid in perpetuity.

### **8.3. Eligibility for Level 3 Certification.**

1. Status. A Candidate for Level 3 Certification must be a Level 2 Certified Member of PSIA-AASI W in good standing, with all education requirements met and all required dues paid.
2. Prerequisites - Any candidate for Level 3 Certification must have the following prerequisites:
  - a. Be a Level 2 Certified Instructor in the same discipline.
  - b. Be willing and able to safely perform all skiing/riding requirements
  - c. Have the professional knowledge to understand and execute all skiing/riding instructions relevant to the National Standards for Level 3 Certification.
  - d. Highly suggested prerequisites include 500 hours of resort approved lessons, 2 full season as a Level 2 Instructor and a Level 2 Specialist Certificate: Children's, Adaptive, Freestyle or Senior's.
3. Sequence of Level 3 Examination - Effective July 1, 2025: An Alpine or Snowboard Level 3 candidate must successfully complete the Online Professional Knowledge exam first. They must then register for and successfully complete both the 1-day Level 3 Ski/Ride Assessment and the 1-day Level 3 Technical Understanding and Movement Analysis Assessment. These two assessments can be taken in any order, but both need to be successfully completed before signing up for the Level 3 Teach Assessment. Any assessment modules completed during the 24/25 season must reflect a passing score in both the Ski/Ride AND the Tech/MA for the candidate to be eligible for the Teach Assessment. Anyone who successfully completed the Ski/Ride assessment prior to the 24/25 Season must additionally complete the Tech/MA assessment in order to be eligible for the Teach Assessment. Anyone who was unsuccessful in the Ski/Ride Assessment prior to the 24/25 Season, must complete both the Ski/Ride AND Tech/MA modules before being eligible for the Teach Assessment. All three assessments (Level 3 Ski/Ride Assessment, Level 3 Technical Understanding and Movement Analysis Assessment, and Level 3 Teach Assessment) must be successfully completed in order to attain Level 3 Certification. Other disciplines refer to the specific discipline details in Section 8 of this document.
4. Validity of Alpine and Snowboard Level 3 Ski/Ride Module Pass - The Successful completion attained on or after July 1, 2025 of the Alpine or Snowboard Level 3 Ski/Ride Assessment or Level 3 Tech/MA Assessment Modules shall be valid in perpetuity as long as the member

remains active and in good standing. Partial passes of Level 3 Ski/Ride or Tech/MA Modules completed prior July 1, 2025 are not valid: anyone who did not attain an overall pass in the Ski/Ride Assessment must complete both the Tech/MA AND the Ski/Ride Assessment. The Online Professional Knowledge exam is valid in perpetuity.

#### **8.4. Specific Disciplines Requirements.**

1. Cross Country - Level 1, 2, 3
  - a. Complete Cross Country Level 1 E-Learning Course – completed prior to the Prep Clinic
  - b. One-Day Prep Clinic attended in the same season as the exam
  - c. Complete the E-Learning Module: Delivering the Beginner Experience - Cross Country
  - d. Ski and Teach Modules - One-Day
2. Telemark - Levels 1, 2, 3
  - a. Complete mandatory one-day Prep Clinic
  - b. Level One & Two complete Telemark E-Learning Course – completed prior to signing up for exam
  - c. Level One - One-Day Exam
  - d. Level Two & Three – One or Two-Day Exam, based on group size
3. Adaptive Alpine & Adaptive Snowboard - Levels 1, 2, 3
  - a. Level One
    - i. Pass Level 1 Assessment in primary discipline and choose adaptive certification track
    - ii. Take and pass the Adaptive E-Learning Course
    - iii. Register for and complete one-day assessment in discipline combination (Alpine-VI/Cog, Standup, or Mono-Ski/Bi Ski. Snowboard-Cog/VI, 3-track/4-track, or Bi-Ski/Mono-Ski)
  - b. Level Two Specialist
    - i. Register for and pass the Alpine or Snowboard Level 2 Professional Knowledge written test.
    - ii. Pass any of the adaptive discipline specific assessments. Individuals can pass any number or combination of disability assessments.
  - c. Level Two Adaptive Certification
    - i. Register for and pass the Alpine or Snowboard Level 2 Professional Knowledge written test.
    - ii. Register for and successfully complete all adaptive discipline assessments in primary discipline.
    - iii. Pass Level 2 Assessment in primary discipline.
  - d. Level Three Specialist
    - i. Register for and pass the Alpine or Snowboard Level 3 Professional Knowledge written test.
    - ii. Pass any of the adaptive discipline specific assessments that they hold the Level 2 Specialist Credential in.
  - e. Level Three Adaptive Certification
    - i. Register for and pass the Alpine or Snowboard Level 2 Professional Knowledge written test.
    - ii. Pass Level 2 Assessment in primary discipline.
    - iii. Register for and successfully complete all adaptive discipline assessments in primary discipline.

#### **8.5. Eligibility for Specialists.**

Specialists are available for the following specialties: Children, Freestyle, Seniors, and Adaptive

1. Children Specialist
  - a. Children Specialist Level 1
    - i. PSIA-AASI Level 1 Certified in Alpine, Telemark, Cross Country, or Snowboard
    - ii. Complete the Children Specialist 1 E-Learning Course
    - iii. Pass Two-Day Specialist Course
  - b. Children Specialist Level 2
    - i. PSIA-AASI Level 2 or 3 Certified in Alpine, Telemark, or Snowboard with CS1
    - ii. Complete the Children Specialist 2 online workbook
    - iii. Pass Two-Day Specialist Course
2. Freestyle Specialist
  - a. Level 1
    - i. PSIA or AASI Level 1 Certified in Alpine, Snowboard, or Telemark
    - ii. Successfully complete the Freestyle E-Learning Course
    - iii. Attend and pass the three-day Freestyle Specialist Course
  - b. Level 2
    - i. Have FS1 or Alpine, Snowboard, or Telemark Level 2 Certification
      1. If skipping FS1 need to complete the FS E-Learning Course
    - ii. Attend and pass the three-day Freestyle Specialist Course
  - c. Level 3
    - i. Have passed Freestyle Level 1 or 2 Specialist Course
    - ii. Attend and pass the three-day Freestyle Specialist Course
3. Seniors Specialist
  - a. Seniors Specialist Level One
    - i. PSIA AASI Level 1 Certified in Alpine or Snowboard
    - ii. Review Senior Handbook
    - iii. Successfully complete the two-day on snow Senior Specialist Course
  - b. Seniors Specialist Level Two
    - i. PSIA AASI Level 2 Certified in Alpine or Snowboard
    - ii. Review Senior Handbook
    - iii. Successfully complete the two-day on snow Senior Specialist Course
4. Adaptive Specialist
  - a. See information in section 8.4
5. Advanced Trainer: Advanced Trainer is not a certification but is available as a training pathway.
  - a. Active PSIA-AASI Certified Western Member in good standing
  - b. Level 3 Certification in your primary discipline
  - c. Children's Specialist Level 2 strongly recommended
  - d. Attended Resort Trainer Course at least once within the past two seasons
  - e. Attended the free online weekly Resort Trainer webinar
  - f. Currently working as Resort Trainer at your home resort and have the approval of your snowsports director or training manager to pursue Advanced Trainer
  - g. Thorough understanding of teaching methodology
  - h. Experience training instructors and running clinics
  - i. Willingness and ability to meet the demands of sports trainer and presenter

## **8.6. Certification and Specialist Pathways.**

The specific pathway to each level of certification and specialty shall be maintained on the website and other electronic forms by PSIA-AASI W.

### **8.7. Proficiency Exception.**

1. USSA Coach Certification - A member who has achieved USSA 300 Level Coaching certification may petition to skip PSIA-AASI W Level 1 and take the Level 2 certification exam.
2. Multi-Discipline - A member who is certified Level 2 or 3 in one of the Nationally recognized disciplines may petition to "skip" Level 1 in another discipline and take the Level 2 exam in the other discipline.

## **IX. MEMBER SCHOOLS**

### **9.1. Member School Recognition**

PSIA-AASI recognizes snowsports member schools, subject to any limitations established by ASEA.

### **9.2. Member School Standards**

1. Teach skiing and/or snowboarding as a primary business and operate under an IRS Employer Identification Number (EIN).
2. Produce verification of an approved venue of operation.
3. The school accepts and incorporates into its training and programs the fundamental teaching philosophies as contained in educational materials developed and distributed by PSIA-AASI.
4. The school is required to provide in-service training for all instructor staff.
5. The Director or other person designated to be in charge of training is required to attend a national or Regional educational event on an annual basis.

### **9.3. Process.**

The Region will receive all applications for membership and will clear qualifications. Applicants are required to meet any regional requirements that are in addition to the national standards before acceptance for national membership. All applicants for both member school classes are required to become both regional and national member schools, and to pay required dues for both organizations. Dues may be paid via check made to the Region or online. The Region will collect the total dues required and assure proper completion of all necessary forms.

### **9.4. Benefits.**

Member Schools in good standing receive the following benefits:

1. Discounted advertising in Western publications
2. Free "Search Jobs" postings on [www.psia-w.org](http://www.psia-w.org)
3. Discounted Member School Clinics
4. Custom Training Package Options

5. Western Member School Council Meeting Early Season
6. Western Member School Council Meeting at Convention

## **X.** **TRANSFER OF FOREIGN CERTIFICATIONS**

### **10.1. How to petition for Foreign Certification Equivalency**

1. Petitions must be submitted electronically to the Region or Member Services Team.
2. Candidate must be a Registered member of PSIA-AASI W
3. Petition must include proof of certification, biographical information, and employment information in the snowsports field.

### **10.2. Petition Process**

1. Petitions must be submitted in writing or electronically.
2. PSIA-AASI dues must be paid and current prior to petitioning.
3. The petitioner must be a member in good standing with PSIA-AASI W.
4. The petitioner must be currently working as a Professional Ski or Snowboard Instructor at a PSIA-AASI West Member School.
5. The petitioner should be enrolled in an on-going training program that is registered with PSIA-AASI W or equivalent.
6. The petitioner must include documentation to establish the basis for exception to exam eligibility.
7. The petitioner must write a letter stating the petitioner's justification for why he/she should be allowed to challenge the given level of certification and any other petitioning needs; please be thorough yet concise.

### **10.3. Approval of Petition.**

The petitioning member(s) must complete and demonstrate having completed all required prior exam processes and prerequisites before being approved by the administration to attempt the next level of certification.

## XI. CANCELLATION/REFUND POLICIES

### **11.1 Event Signup**

Members must sign up for the event/exam at least two weeks (10 working days) prior to PSIA-AASI W events; provided, however, for all Adaptive events, members must sign up for the event/exam at least three weeks (15 working days) in advance.

### **11.2. Waiting Lists.**

We do keep 'Waiting Lists' for members who do not make the two-week deadline. If space becomes available, waiting list members will be informed that a space has opened up in the event via email, or by phone. A \$ 15 Late Registration Fee will be assessed for sign-ups under the two-week deadline, as reflected in "Last Call" pricing.

### **11.3. Charges for Cancellation**

To Cancel out of an event, you will need to contact PSIA-AASI W or our Member Services Team.

#### **Full Refund Period:**

Up to three weeks prior to the start date and time of your event, you can transfer your event fee to another event or cancel your registration at no cost.

#### **Partial Refund Period:**

Between three weeks and one week prior to the start date and time of your event, you can cancel your event or transfer your event fee to another event for an administrative fee equal to 50% of the cost of your event registration.

#### **Non-Refundable Period:**

Less than one week prior to the start date and time of your event, no event transfers are provided, and events are non-refundable. Please note that no refunds will be issued for events once attended. We encourage members to review event details carefully before registering to ensure a satisfactory experience.

**Policy Exceptions:** Extenuating circumstances (medical or bereavement, etc) will always be considered for a full refund if the request is received within one week after the start of the event.

### **11.4. Event Cancellations**

We reserve the right to cancel an event at any time due to a lack of registrations, weather conditions, health & safety concerns, or other reasons of any type. If this is the case, all event registration fees will be refunded. We strongly recommend insurance for your event costs and accommodations in the event of unforeseen circumstances.

PSIA-AASI W reserves the right to cancel an event due to low registration. Attendees will be notified of the cancellation at least three working days in advance of the event and given a full refund.

Cancellations due to weather: Normally, PSIA-AASI W will not cancel events due to inclement weather. PSIA-AASI W will cancel events if there is CalTrans or NVDOT order to keep the roads clear, if roads are closed, or if the host resort does not open. In these instances, members will be given a full refund of their registration fees. Members should check the closure status of the roads and resort prior to traveling there. Members who experience difficult traveling conditions and/or personal emergencies that keep them from attending an event are NOT entitled to a refund of registration fees.

### **Event Cancellation Refund Policy**

If an event is cancelled by the Region, participants will be contacted regarding refund options. Participants will have **30 days** from the date of notification to indicate their preferred option (e.g., refund to the original payment method, transfer to another event, or application as a credit toward future events).

If an event location is changed and relocated to a venue within a fifty (50) mile radius of the original location, no refunds shall be issued on the basis of the location change.

If no response is received within the 30-day period, the Region will issue a **refund to the original payment method** by default.

## **XII. CUSTOM EVENT PROCEDURES**

### **12.1. Scheduling Deadline**

Members, Member Schools, and Resort Trainers may request that a Custom Event be added to our calendar. All Custom Events require member school approval prior to request. All requests for custom events must be approved by the DD and CEO. Not all custom events will be approved. Requests are due by February 1 or three weeks prior to the event, whichever is earlier.

## **XIII. MANDATORY EDUCATION REQUIREMENTS**

### **13.1. Requirements.**

PSIA-AASI W requires ongoing education to maintain instructor proficiency and competence and the high level of Professionalism signified by wearing the PSIA-AASI pin. Certified members are required to obtain a minimum of six continuing education units (6 ceu's) per membership year (July 1 – June 30) or 12 CEU's every two membership years. Any CEU hours greater than 6 obtained in a membership year will be applied towards the CEU requirement for the following membership year only. Members who do not meet the education requirements will have their certifications deactivated until they can do so.

A PSIA-AASI certification is a professional credential. Members who do not follow the education policy will be put on Inactive Status in accordance with the National Affiliation Agreement and Addendum Certified Inactive Status Policy.

Education credits are obtained by participating in training events in any Region of PSIA-AASI. Events are posted on our event calendar every Fall. Members must be in compliance with the

Education Policy to be eligible to take an exam or module. Members are responsible to keep track of their education status.

**13.2. Fee.** There is a \$50 lapsed CEU fee at the end of every membership year that you do not meet the CEU requirements. This fee will appear on your membership dues renewal invoice.

**13.3. Exceptions to Education Policy**

1. **Waiver.** A member that can't maintain or pursue CEU requirements due to personal reasons (e.g. injury, illness, pregnancy/postpartum, financial hardship, military obligations, academic leave, or moving to another country) may request a waiver by emailing [info@psia-w.org](mailto:info@psia-w.org). Include your name, member number, the reason you are requesting a leave of absence, the amount of time you will be gone, and any supporting information.
2. **Outside Education Credits.** Members may apply for education credits if they have taken a course or clinic from an Organization other than PSIA-AASI that has increased their knowledge or enhanced their professionalism as an Instructor. After participating in an official formal education program offered to the public by an educational organization such as a college, association, or company that normally provides training courses, a member can apply for PSIA-AASI CEU's by submitting documentation of course completion signed by an official of the sponsoring organization and material provided by the educational organization that describes the program and gives information concerning the dates the program is offered, program fees, program hours, etc.

Once submitted and approved by the Western Deputy Director, members will be emailed an invoice for payment of \$12.50/CEU\* with a max of 12-CEU's every three membership years. (1 CEU = 1 hour of education). Once payment is received, education credit(s) will be applied to your member account effective the date the course was taken.

## **XIV.** **DISCIPLINE OF MEMBERS**

**14.1. Objective.** The following PSIA-AASI Procedures for Discipline of Members ("Procedures") have been adopted by the Board of Directors (each, a "Board") of the Regions (each, a "Region") (a Board of a Region shall be referred to herein as a "Region Board") and PSIA-AASI ("National") and are designed to set forth the rules and procedures which will be followed for the discipline of members.

**14.2. Grounds for Discipline of Members.** The following are grounds for discipline of members of the Region:

1. Violation of the PSIA-AASI Code of Conduct ("Code"), as it may be amended from time to time.
2. Failure to follow any material provision of any rules, regulations, policies or procedures adopted by the member's Region (each, a "Rule"), as such rules may be implemented and amended from time to time.
3. Failure to cooperate in an investigation of an alleged violation of the Code or Rules or to comply with the conditions of any discipline imposed on the member pursuant to these Procedures.
4. Conviction of a member of a felony or agreement to a plea bargain where such member admits to a felony.

The foregoing constitutes a non-exclusive list of grounds for discipline. Other acts or omissions that constitute unprofessional misconduct or that bring (or reasonably could bring) a Region or PSIA-AASI into disrepute or impair the goodwill of the Region or PSIA-AASI, as determined by the member's Region Board, may also constitute grounds for discipline.

**14.3. Procedure.** The following procedure shall be followed by the Region in the discipline of its members.

1. Complaint Process

- a. Member discipline shall be initiated by filing a complaint for discipline ("Complaint") against a member. Anyone may submit a Complaint, including an officer, member or staff member of the Region, National, or any outside person or organization.
- b. A Complaint must be in writing, identify the name of complainant, provide the complainant's contact information (mailing address, phone, and email), and include sufficient factual background to establish grounds for initiating disciplinary proceedings against a member. If the complainant alleges that the member has violated a Code provision or Rule or has engaged in other conduct that would provide grounds for discipline, the complainant should identify each Rule, Code provision, or grounds.
- c. A Complaint shall be directed to the attention of the CEO ("Executive) of the member's Region. If a Complaint is against the Executive, the Complaint shall be directed to the attention of the Chair of Region Board, who shall assume the role of the Executive for purposes of these Procedures.
- d. If a Region receives a Complaint regarding a member of another Region, the receiving Region shall promptly forward the Complaint to the member's Region.
- e. Should a complainant need to amend a Complaint, the complainant shall promptly provide such amendment in writing.

2. Investigative Process

- a. The Executive shall be responsible for investigating a Complaint. The Executive may delegate investigative authority to a Region staff member or other appropriate party, including an outside investigator. However, such delegate shall only have authority to make recommendations to the Executive as to whether Disciplinary Action is warranted.
- b. The Executive has the investigative authority to:
  - Collect facts and evidence relevant to the Complaint, including by interviewing the member and other witnesses and obtaining relevant evidence.
  - Determine the merits of the Complaint.
  - Determine whether Disciplinary Action is warranted.
- c. Prior to reaching any conclusion that Disciplinary Action is warranted, the Executive must afford the accused member an opportunity to provide mitigating or exculpatory evidence.
- d. Upon completion of an investigation, the Executive shall prepare a report summarizing the allegations of the Complaint, the investigation process, the Executive's findings and

conclusions, and the Executive's determination as to whether and what Disciplinary Action is warranted.

- e. If the Executive determines that the Complaint is not supported or that it has been resolved such that no Disciplinary Action is warranted, the Executive may dismiss the Complaint or close the case.
3. Provisional Suspension

- a. To protect the complainant, other members, and the integrity of the Executive's investigation, the Executive may temporarily suspend the membership of an accused member until completion of the Executive's investigation or exhaustion of any appeal period.

#### **14.4. Disciplinary Action.**

1. Following the completion of an investigation, if the Executive determines that disciplinary action is warranted, the Executive has the authority to impose any of the following disciplinary action against a member ("Disciplinary Action"):
  - a. Letter of warning or reprimand. A letter of warning or reprimand carries with it no loss of membership or membership rights. The purpose is to place a member on notice that particular action is not condoned and to cease engaging in such conduct.
  - b. Probation. Probation is more serious than a letter of warning or reprimand and serves as notice to the member that the conduct is contrary to the requirements of membership and grounds for more serious discipline should the conduct continue. Probation shall be imposed for a specified period of not more than one year and with, or without, loss of full membership privileges. Probation may include other reasonable conditions as a condition of probationary status.
  - c. Suspension. Suspension means all membership privileges are forfeited during the suspension period, at the end of which full membership privileges may be restored. Suspension shall be imposed for a period of not more than one year.
  - d. Termination of Membership. Termination means all membership privileges are forfeited and the terminated party is no longer a member of the Region or National.
2. If the Executive determines to impose Disciplinary Action against a member, the Executive shall notify the member in writing of the Disciplinary Action and reasons supporting the decision, including the specific grounds and conduct warranting discipline. In order to protect the privacy or safety of the complainant and/or witnesses, the Executive may withhold the identity of the complainant or any witnesses who participated in the Executive's investigation.
3. Disciplinary Action involving a letter of reprimand shall take effect immediately. If the Disciplinary Action involves probation, suspension, or termination of membership, the Executive shall notify the member of the right to appeal the Disciplinary Action.
4. The Executive shall notify his or her Region Board of any Disciplinary Action imposed, whether or not the member elects to appeal the decision.

#### **14.5. Appeal and Hearing.**

1. A member may appeal an Executive's imposition of Disciplinary Action for probation, suspension, or termination of membership as follows:

- a. Appeal Request: Requests for an appeal shall be made in writing to the Chair of the Region Board and must be received by no more than thirty (30) calendar days after the member has been notified of the disciplinary action.
- b. Hearing: The appeal hearing shall be held as soon as feasible and in no event later than sixty (60) calendar days after the appeal request is filed with the Region Board. The member shall be given the opportunity at the hearing to argue why the Disciplinary Action should not be imposed. Formal rules of evidence shall not apply to the hearing and no new evidence or witness testimony shall be permitted without advance permission of the Region Board. The Executive may address the Board at the hearing and shall be present to answer any questions from the Board. The member may, with advance notice, have legal counsel present to advise the member.
- c. Decision: The Region Board shall make a decision in writing within thirty (30) days of the appeal hearing and transmit a copy of the decision to the member by certified mail, return receipt requested.

2. If the member does not timely request an appeal or if the member fails to attend a scheduled appeal hearing, the Executive's decision shall take effect thirty (30) calendar days after the Executive transmits the Disciplinary Action decision to the member.

#### **14.6. Termination of Membership.**

- 1. Termination of a member's membership in a Region shall automatically terminate such person's membership in National.
- 2. The Region shall immediately notify National in writing upon a member's termination or suspension.
- 3. All Regions will respect and afford reciprocity to all disciplinary decisions made by another PSIA-AASI Region. Members will not have the ability to join other Regions if they were terminated in one of the other Regions.

## **XV. PERSONNEL**

#### **15.1 Chief Executive Officer (CEO).**

The CEO shall manage the overall strategy, leadership, operations, and resources of the Corporation, act as the main point of communication between the Board and corporate operations and be the public face of the Corporation. The CEO is a paid employee of the Corporation. The Board shall hire the CEO upon recommendation by the Board Chair.

#### **15.2. Deputy Director (DD).**

The DD shall manage overall operations related to education and exam operations and report to the CEO. The DD shall be hired and selected from an application process administered by the CEO.

### **15.3. Discipline Task Force Chairpersons.**

1. The Chairpersons of the shall be selected from an application process. The DD shall select the Chairpersons and make a recommendation to the CEO, who shall approve the Chairpersons. A Task Force Chairperson shall serve for a period of two years. Discipline Task Force Chairpersons shall report to the DD.
2. The Task Force Chairperson is a volunteer position and may serve without compensation. The term of service for the Task Force Chairperson shall be no longer than two years. The Chairperson can reapply.

### **15.4. Office/Administrative Staff.**

The CEO is authorized to hire such person or persons necessarily to perform the operational duties of the Corporation, subject to the budget approved by the Board.

### **15.5. Volunteers.**

1. The organization relies heavily on volunteers from its membership to provide the best experience for the entire membership.
2. Volunteer Defined. A Volunteer is any person who is assisting the nonprofit organization with no expectation of payment. Persons who may be employees of the organization are volunteers when they are performing actions outside of the scope of the duties as employees.
3. All volunteers shall sign a Volunteer Release of Liability before taking on any action as a volunteer on behalf of the Corporation.
4. **POLICY NOT APPLICABLE TO EMPLOYEES ACTING IN CAPACITY OF EMPLOYEE.** An employee is acting in the capacity of an employee when performing duties and tasks included within the employee's job description. Persons who happen to be employees and acting outside the capacity of an employee shall be treated as Volunteers.
5. **BOARD OF DIRECTOR REIMBURSEMENT POLICY.** From time to time, the Board establishes policies for reimbursement of travel expenses to board members for attending board meetings and conducting specific board of director duties. Those policies shall govern travel reimbursement to board members for official board business.

## **XVI.** **TASK FORCE DESCRIPTIONS**

The Corporation shall have operational task forces which are designated periodically by the Board or the CEO. The names and purpose of current task forces are as follows.

### **16.1. Administrative Task Forces.**

The CEO may, from time to time, create Task Forces for the administration of the Corporation.

### **16.3. Discipline Task Forces.**

All discipline Task Forces shall provide the leadership and staff with nationally aligned, up-to-date education and certification materials and facilitate the educational and certification process. They

serve as a critical connection between national alignment and regional practices. In addition, these Task Forces shall serve as a conduit to our Regional Member Schools. The Task Forces are as follows:

Discipline Task Forces	Other Task Forces
Alpine Snowboard Cross Country Telemark Adaptive Senior Children Freestyle Member Schools Women and Families	Advisory Task Force

## **XVII.** **TASK FORCE FUNCTIONS**

### **17.1. Composition.**

The Task Force Chairperson may select volunteers to work on his/her Task Force, subject to the approval of the DD and CEO.

### **17.2. Task Force Quorum.**

Task Force action may be taken only upon presence of a quorum of the Task Force members. A quorum shall be the majority of Task Force members.

### **17.3. Function & Process.**

1. The Task Force's role is to conduct the deliberative aspect of any issues or propositions that are submitted to the Task Force for consideration by the National Education Leadership Council, DD, National Disciplinary Task Forces, CEO, and/or any issue or proposition originating within the Task Force itself.
2. Upon deliberative action on any issue or proposition, whether assigned or originating within the Task Force, the Task Force shall provide a report to DD with any one or more of the following:
  - a. A report of considerations taken by the Task Force and a recommendation to adopt or reject, in whole or in part, the issue or proposition;
  - b. Additional recommendations that modify the original issue or proposition;
  - c. The written report may include any views contrary to the Task Force's recommendation, prepared by those holding a minority position.
3. The DD will consider all recommendations. Approval of any recommendation is subject to the approval of the CEO.

#### **17.4. Meetings and Actions of the Task Force.**

All Task Force minutes, reports and documentation may be submitted using Basecamp or other data/information/project management program used by PSIA-AASI W so long as recording of such documentation is made available to the DD and CEO.

The Task Force chairperson will assign one member at each meeting to maintain minutes of the meeting and such minutes shall become a permanent record for the Task Force.

Each Task Force shall submit a written report of its progress, outline of the upcoming year's goals and timeline to the DD, no later than Sept 15 and May 15.

Each Task Force shall provide a report of progress upon the request of the DD.

#### **17.5. Task Force Chairperson Responsibilities.**

The Task Force Chairperson shall be responsible for the following:

1. The coordination, development and implementation of all Task Force activity on behalf of the Corporation.
2. Submission of all Task Force policy and procedure recommendations to the DD for approval prior. [Upon DD approval, the recommendations will be reviewed by the CEO for final approval.]
3. Represent PSIA-AASI W at the National work sessions as appointed and approved by the DD.
4. Communicate between the DD, Task Force members, Education Staff, member schools and other recognized disciplines within PSIA-AASI W.
5. Attend prescribed Task Force meetings, Staff meetings, and Board meetings as requested.
6. Assist in the development of the yearly calendar of events and support effective staffing for discipline events.
7. Coordinate and facilitate Task Force meetings.

#### **17.6. Task Force Member Responsibilities.**

1. The position of a Task Force member is that of a volunteer and is unpaid.
2. Task Force members are expected to attend all Task Force meetings, actively participate in the Task Force, and see projects assigned to Task Force members to completion.

#### **17.7. Non-Performance.**

The DD, CEO or chairperson may remove any Task Force member for non-performance of duties. The CEO or DD may remove the chairperson for nonperformance of duties. Nonperformance may include:

1. Failure to adhere to the policies and procedures mandated by the Board.
2. Failure to attend all prescribed meetings and work sessions.
3. Failure to complete projects or work assignments.

### **XVIII**

### **Accounting Financial Best Practices**

#### **18.1 Accounts Receivable System.**

1. Incoming Checks: PSIA-AASI W personnel will receive incoming checks in the following manner: Two people will be involved in receiving funds at all times. The Deputy Director will open

all physical mail, establish whether incoming funds are included and set those mail items with the incoming funds aside for the actual receipt and recording of funds. The CEO will be responsible for the receipt and recording of funds, and the deposit of the funds into the appropriate bank account.

2. Electronic Funds will be received by the CEO who will deposit in the appropriate account. The CEO will note in the transaction any additional information necessary to identify the funds, their purpose and which account they were transferred.

#### **18.2 Accounts Payable System.**

Check Writing: PSIA-AASI W personnel will disperse funds and pay financial obligations in the following manner: A minimum of two people will be involved in the dispersal of funds via check at all times. The Deputy Director will receive all physical invoices and note other financial obligations that need to be paid, such as payroll, credit card bills, etc. That person will present those invoices to the CEO for approval to be paid. The CEO will authorize payment of those financial obligations. The CEO will then prepare checks for signature based on the invoice authorization. The CEO will then sign the checks and record the checks that were written in the PSIA-AASI W Accounting System.

1. At no time will the person receiving a check as payment for an obligation sign the checks. That must be done by a separate person (someone who is a superior) with check signatory authority.
2. Electronic Payment: The CEO or the Deputy Director will issue payment electronically instead of a check following the same procedure as above.
3. Payroll: The Deputy Director will enter all payroll entries. The CEO will review and approve all payroll entries. The DD will submit the final register for ACE (payroll processor) to print. Payroll information will be posted monthly within the financial statements noted in 18.4.

#### **18.3 Credit Card Charges.**

All credit card and check transactions will be assigned a GL number and recorded. Receipts should include the detailed receipt so that the actual purchases can be reviewed, not just the signature slip with a total.

#### **18.4 Financial Statements.**

Monthly, quarterly, and annual financial statements shall be produced. Monthly financial statements are posted by the 15<sup>th</sup> of the month for review by the board. Balance sheet, Budget vs Actual Variance Report, P & L, Annual Budget Overview, Bank Statements and Reconciliations, Credit Card Statements and Reconciliations, and investment account statements can be made available for review by the board.

#### **18.5 Bank Statements Reconciliation.**

All bank statements and reconciliations will be reviewed and approved by the CEO.

#### **18.6 Financial Review.**

Any and all records will be made available to a Board representative(s) who has been designated to represent the Board for review of those records within 5 business days after request.

## **18.7 Account Authorization.**

The CEO and Deputy Director shall be listed as Key Executives on all regional accounts with full authorization. The Board Chair shall also be an authorized signor all on regional accounts. Account access must be updated within 15 business days of a change in board leadership. No account activity may occur without the direct authorization of the CEO.

## **XIX.** **MISCELLANEOUS**

### **19.1. Electronic Notices and Voting.**

1. **Objective.** In accordance with its bylaws, the PSIA-AASI Western Region's Members shall conduct the annual election of the Board of Directors via secure web-based (online) voting. The policies and procedures herein have been adopted by the Board of Directors to ensure proper voter authentication, tamper-free balloting, and accurate tabulation and reporting of election results.
2. **Procedure.** A copy of this policy shall be distributed to all voting members and posted on the Association's website. A "voting member" means any member entitled to vote as specified in the Association's bylaws.
  - a. The PSIA-AASI W office shall send a notice to each voting member listing the individuals nominated for positions on the Board ("Nomination Ballot") at least 10 days prior to the designated online voting period.
  - b. Voting members will be provided with written notice of a pending electronic vote for the election of the Board of Directors at least 10 days in advance of the voting period.
  - c. A voting period during which electronic (online) voting will take place shall be at least fourteen (14) days during which voters may cast their votes.
  - d. Each voting member shall be entitled to cast one (1) vote for every available board seat according the approved Board candidates included on the Nomination Ballot.
  - e. The voter is required to have a valid email address in order to participate in the electronic voting.
  - f. Official notification of the results of the Board elections shall be sent to all voting members within three (3) business days of the close of the voting period.
3. **Voting System.** The Corporation will ensure that the electronic system selected to process and manage the online voting offers the following security features:
  - a. Prevents voting members from being able to cast more than one (1) vote per election;
  - b. Protects voter data from tampering;
  - c. Maintains confidentiality regarding the voting preferences of the voting members;
  - d. Ensures ballots comply with the Corporation's bylaws and all applicable rules for non-profit trade associations;
  - e. Accessible 24/7 during the designated voting period.
4. **Extenuating Circumstances.** In the event that a voting member is unable to vote electronically due to failure of the electronic voting system or other extenuating circumstances:
  - a. The Board Chair or CEO, shall review and evaluate the extenuating circumstances.
  - b. If the extenuating circumstances are deemed to be valid, the Board authorizes the Board Chair or CEO to accept a written ballot from any voting members impacted by the extenuating circumstances.

**5. Agreement by Voting Members/Voter Designees.** By participating in the electronic voting process for the election of the Board of Directors, each voting member/voter designee is deemed to have agreed to comply with the following requirements of the Association:

- a. That each voting member consents to electronic voting pursuant to this Policy;
- b. That each voter designee has access to a computer, a web browser and Internet connection suitable for accessing websites on the World Wide Web, has an email address, and has sufficient knowledge and ability to access the electronic voting system using the instructions provided by the Association;
- c. That each voter designee shall not share with any third party any unique identifying data provided to him or her for electronic voting by the Association;
- d. That each voting member will agree that under no circumstances will the Corporation or its Board be liable for any failure of the electronic voting system, or failure of the voting member's computer and/or Internet connection; and

That each voting member will comply fully with the Corporation's bylaws, this Policy and any other applicable Policies of the Corporation, as amended from time to time, in his or her use of any electronic voting system provided for purposes of electronic voting.

## **19.2. Online Safety and Virtual Collaboration.**

- 1. Objective.** This policy aims to establish best practices for online safety and effective management of virtual meeting rooms within the association, ensuring the protection of sensitive information, adherence to data retention guidelines, and a safe virtual environment for all participants. This policy applies to all online meetings organized by the association, including member meetings, board meetings, staff meetings, and committee meetings.
- 2. Virtual Meeting Platform.** All association-related virtual meetings (such as forums, board meetings, and staff meetings) shall be hosted exclusively on the designated regional Zoom account. This standardized approach will enhance security, provide consistency, and ensure proper record-keeping across all meetings. Under extenuating circumstances, in the event that a committee or task force chair would like to use a personal account to host a meeting, requests to privately host must be provided in writing no less than 30 days prior to any meeting.
- 3. Recording of Meetings.**
  - Authorization: Meetings will be recorded only with prior notification to all participants.
  - Storage and Retention: Recordings will be securely stored on the regional Zoom account for a duration of 30 days from the date of the meeting.
  - Access: Access to recordings is limited to authorized personnel only for reference and review purposes.
  - Deletion: After 30 days, recordings will be permanently deleted from the storage account, except where extended retention is required for legal or compliance purposes and authorized by senior management.
- 4. Prohibition on Public Posting.** Recorded meetings shall not be posted online or shared publicly on any platform, including social media or personal accounts. This restriction ensures that association discussions and member information remain private and protected.
- 5. Security Measures.**

- Meeting Access: All meetings will be password-protected or have a managed waiting room, and participants must enter through a secure link provided by the meeting organizer. Only registered participants will be given access. Secure links will not be posted online.
- Participant Authentication: Hosts may use Zoom's waiting room feature to admit attendees individually, ensuring that only authorized members and staff participate.
- Monitoring and Support: The designated host will monitor the meeting room to maintain the security of the session and address any technical or security concerns promptly.

6. **Compliance and Reporting.** Any incidents of unauthorized access, data breaches, or other security concerns must be reported immediately to the association's management team. Regular reviews of this policy will be conducted to ensure it reflects current best practices in online safety.

### **19.3. American With Disabilities Act Policy.**

Notice to candidates:

PSIA-AASI is committed to providing access to those persons with disabilities during the clinic and examination process. An individual with a disability is defined by the ADA as a person who has a physical or mental impairment that substantially limits one or more major life activities, a person who has a history or record of such an impairment, or a person who is perceived by others as having such an impairment. Various states may have broader definitions.

If you feel you have such a disability and seek a reasonable accommodation during the testing process we need to know this **well before the examination** so we can work together to create, if possible, the accommodation which will allow you to take the exam under conditions that maintain safety for all involved.

If you seek an accommodation, please contact us in writing ([info@psia-w.org](mailto:info@psia-w.org)) **four weeks** before the clinic or examination (or as soon as the need for the accommodation is apparent), to notify the region of your request for an accommodation.

PSIA-AASI may seek medical or other guidance to address the most appropriate accommodation and to assess the need and type of accommodation requested. If this is applicable to you, please be prepared with that information.

Please Note:

The association is not required to provide a reasonable accommodation if doing so will be an undue hardship, or compromises the safety of anyone involved in the examination process. Undue hardship means significant difficulty or expense, significant disruption of the association, or a change to the basic nature of the fundamental skills being tested.

If the person with a disability asks for a reasonable accommodation that is an **undue hardship** for your association, or compromises safety, the association will determine if there is another accommodation that is less burdensome, more safe, and/or less expensive.

### **19.4. Whistleblower Policy.**

PSIA-AASI W requires directors, officers, employees and members to observe high standards of business and personal ethics in the conduct of their duties and responsibilities.

Reporting Encouraged. This Whistleblower Policy is intended to encourage those involved with PSIA-AASI W to raise serious concerns internally so that PSIA-AASI W can address and correct inappropriate conduct and actions. It is the responsibility of all board members, officers,

employees, members and volunteers to report concerns about violations of PSIA-AASI W's code of ethics or suspected violations of law or regulations that govern PSIA-AASI W's operations.

**Zero Retaliation.** No board member, officer, employee, member or volunteer may retaliate against any board member, officer, employee, member or volunteer who in good faith reports an ethics violation, or a suspected violation of law, or suspected violation of any regulation governing the operations of PSIA-AASI W. Any person who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment, termination of membership, or recall of an elected position.

**Reporting Procedure.** Any report of suspected violations shall be given, in writing, to the CEO. The CEO shall notify the person submitting the complaint that the complaint has been received within 48 hours of receipt. The CEO shall investigate and resolve, unless the complaint is made against the CEO in which case the complaint shall be made to the Board of Directors who shall assign a non-involved person to investigate a reported complaint, who must investigate and submit a report and proposed resolution to the Board of Directors within a reasonable time, not to exceed 30 days. For complaints against the CEO, the Board of Directors shall receive the investigation report and proposed resolution and decide on the action to be taken and order execution of the action within a reasonable time, not to exceed 30 days after meeting to consider the report.

**Actions in Good Faith.** Anyone filing a written complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense constituting a violation of the code of ethics and code of conduct.

**Confidentiality.** Violations or suspected violations may be submitted on a confidential basis by the complainant. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

#### **19.5. Conflict of Interest Policy.**

No member of the Board of Directors or Staff shall derive any personal profit or gain, directly or indirectly, by reason of his or her participation with PSIA-AASI W. This shall also include the member's business or other nonprofit affiliations, family and/or significant other, employer, or close associates who may stand to receive a benefit or gain. Each individual shall disclose to the Board Chair any personal interests which he or she may have in any matter pending before the organization and shall refrain from participation in any discussion or decision on such matter.

In addition, any member of the Board of Directors or Staff shall refrain from obtaining any list of clients or donors for personal or private solicitation purposes at any time during the term of their affiliation.

Any new member of the Board of Directors shall be given this policy at the time of their election onto the Board of Directors and the policy will be reviewed annually by the board at a regularly scheduled meeting. Each member of the Board of Directors shall submit in writing all disclosures of actual or potential conflicts of interest at the Spring scheduled meeting. The Board of Directors may adopt a form for purposes of disclosure.

The purposes of this policy are to protect the integrity of PSIA-AASI W and the organization's decision-making process as well as to enable members to have confidence in the integrity, intentions and actions of the officers, staff, board members and volunteers. To that end, this

policy is not meant to supplement good judgment and all members should respect its spirit as well as its wording.

#### **19.6. Document Retention Policy.**

The following shall constitute the PSIA-AASI W Document Retention/Destruction Policy; provided, however, that in the event of any suspected or pending litigation, all document destruction shall cease immediately.

##### Documents to Retain Permanently

- Articles of Incorporation
- Bylaws
- Other Incorporation Documents
- Form 1023 and/or 1024
- Employer Identification Number Determination Letter
- The IRS/State Determination Letter and the Related Documents
- Contracts and Leases Still in Effect
- Retirement and Pension Records
- Staff Personnel Records
- Tax Returns and Worksheets, Revenue Agent Reports, and Other IRS, State or Local Governmental Determinations
- Trademark Registrations and Copyrights
- Patents and Related Papers
- Audit Reports
- Deeds, Mortgages, and Bills of Sale
- Depreciation Schedules
- Year-End Financial Statements with a copy of the General Ledger for the year
- Insurance Records, Current Accident Reports, Claims, Policies, and so on
- Legal and Important Matters Correspondence
- Donation Records of Endowment Funds and/or Significant Restricted Funds

##### Documents to Retain for At Least 10 years

- Bank Statements & Reconciliations
- Accounts Payable Ledgers and Schedules including bills from Vendors
- Contracts, Mortgages, Notes, and Leases (Expired) from the date of Expiration
- Inventory Records
- Accounts Receivable Ledgers and Schedules including Invoices (To Customers)
- Payroll Records
- Personnel Files for Terminated Employees
- Timesheets
- Withholding Tax Statements (example IRS Form 940 and 941)
- Expense Analyses/Expense Distribution Schedules
- Cancelled checks for those items not listed under "Documents To Retain Permanently"
- Donation Records
- Duplicate Deposit Slips
- Journals
- Sales Records

##### Documents to Retain for at Least 4 years

- Correspondence – General

## Documents to Retain for at Least 3 years

- Internal Reports – Miscellaneous
- Employment Applications
- Purchase Orders
- Volunteer Records

## 19.7. ASEA National Policies.

From time to time, ASEA establishes policies that apply nationally and relate to this Corporation and its membership. The CEO is authorized to duplicate and add such policies as addendums to this Policies and Procedures Manual and disseminate the policies to the membership. Operational policies and procedures require no Board approval, governance policies or procedures with significant financial implications (more than \$10,000 in a fiscal year) require approval of the Board.

## 19.8. Nomenclature Best Practices for Website, Written Materials and Overall Communications

Please use these versions when appropriate:

- PSIA-AASI W
- PSIA-AASI Western
- PSIA-AASI Western Region
- Professional Ski Instructors of America and the American Association of Snowboard Instructors Western Region
- Professional Ski Instructors of America and the American Association of Snowboard Instructors Western
- Western Region
- Western Region of PSIA-AASI

Unacceptable versions:

- PSIA/AASI PSIA AASI Psia-Aasi PSIA & AASI

Please use this version when appropriate

- Snowsports is one word, all lower case (unless starting a sentence, when it would be "Snowsports.")

Unacceptable versions

- Snow sports
- Snow-sports

Please reference the Regional Style Guide and the PSIA-AASI National Branding Standards for additional information using this [link](#) :

## 19.9. Expense Reimbursement Policy and Procedure for Members of Board of Directors

Board members are entitled to reimbursement for any expenses incurred that are essential to conduct board business, specifically board meetings and retreats. The organization will not reimburse board member expenses for any expense incurred that is not essential to conduct board business.

Costs must be prudently incurred and should be pre-approved or pre-established to ensure a high degree of responsible fiscal management. Covered costs include:

**Travel:** Reasonable airfare or mileage reimbursement at \$0.66/mile. The region may not reimburse for the cost of gas in addition to the cost of mileage.

**Accommodations:** The region will provide a link for best available lodging and reimburse the cost of that lodging for the nights board members are required to stay for board meetings (generally including the night before and the night of any full day meeting). Board members who are unable to book their own lodging should coordinate with the region who will book lodging on their behalf.

**Meals:** The region will cover any meals where the board is dining together, generally dinners during board retreats. The region will also provide lunch and snacks during all day board retreats.

**Board Training:** The region will prepay for any required or requested training on behalf of the board.

**Pre-approved membership linkage activities:** If a board member is required to support any in-person events, or is participating in essential board business, the region will cover any cost associated with their travel and lodging at that event. Requests to attend with travel and lodging covered by the region must be pre-approved prior to submitting requests for reimbursement. Please note, requesting to attend an event, being invited to attend an event, or showing up at an event does not constitute a pre-approved membership linkage activity.

**To Submit Expenses:** All requests for reimbursement must be submitted within 60 days of an event. Requests must be registered online through the Staff Resources link in the footer of the regional website. Requests must include all documentation in order to be considered for reimbursement.

The CEO is authorized to pay any expense report submitted in accordance with this policy.

In the event the CEO does not believe the expenses sought are in accordance with this policy, the CEO shall submit the expense report to the Board of Directors at the next meeting for review and approval/disapproval.

#### **19.10. Revisions to the By-Laws, Governance Policy Manual and Policies and Procedures**

In accordance with the Bylaws and the Governance Policy Manual (GPM), the Board Secretary will provide the necessary updates for each document and present for approval as follows:

**Bylaws:** Any draft proposal by the Membership, the Board or the CEO to change the By-Laws will be edited and controlled by the Secretary for presentation to either the Membership or the Board for approval in accordance with Article XV, Amendment of Bylaws. The Membership or the Board as appropriate will approve or reject the proposed change(s). The Secretary will modify and file the Bylaws as amended within 10 business days after approval.

**Governance Policy Manual:** Any member of the Board can generate a proposal to change the Governance Policy Manual. Any draft proposal to change the Governance Policy Manual will be managed by the Secretary for presentation to the Board for approval by the Board. The Board has the authority to approve or not approve the proposed changes. The Secretary will modify

and file the Governance Policy Manual as amended by the Board within 10 business days after approval.

**Policies and Procedures:** The CEO is responsible for maintaining up to date policies and procedures. The CEO will ensure that the board and members are notified of material changes to these policies and will keep the most recent version of this document posted and available at all times. The CEO may not make any changes to policies that are dictated by regional bylaws or governance policy, and in cases where policies overlap, the bylaws and governing polices will supersede the policies outlined in this manual.

## XX.

### **PSIA-AASI Western Region and PSIA-AASI Western Region Education Foundation Support and Interactions**

**20.1. Policy.** PSIA-AASI W will provide minimal services to EF for supporting the administration and operations of the Foundation in a timely manner per the cadence outlined in the procedure. This includes:

- Scholarship administration (see Scholarship Administration below)
- Transfer of donation funds to the appropriate EF financial accounts in the event that funds are deposited into regional accounts or received by the regional leadership
- Approval of all communication of EF information to the PSIA-AASI W membership
- Ensuring EF participation in PSIA-AASI W Spring Convention, and any other events the EF and PSIA-AASI W mutually agree the EF will participate in

ASEA will provide administrative and support services to EF, in a separate contract managed by agreement between ASEA and the EF. This includes:

- Tracking and reporting of donations and regular updates to the Contributions by Seasons spreadsheet
- Tracking and reporting of all income received via ASEA managed platforms such as AMS
- Transfer of donation funds to the appropriate EF financial accounts in the event that funds are deposited into ASEA accounts or received by the ASEA office
- Maintaining the EF accounting system in Great Plains and providing regular, monthly, quarterly, annual financial report, and any reports required for tax filing
- Provide accounting support for any audits of EF accounts and transactions
- Posting and managing the EF monthly newsletter with CEO approval

The EF will manage its own administration and operations. This includes:

- Acknowledgment of donor receipts to donors (both PSIA-AASI W Members and non-members)
- Generating all member facing communication and submitting to ASEA for Regional CEO approval

EF will provide the following to PSIA-AASI W CEO to enable planning, scholarship execution and communication in a timely manner the cadence outlined in the procedure. This includes:

- Information on the Scholarships to be awarded
- Distribution of scholarship funds
- Regular reporting to PSIA-AASI W as outlined in the procedure

Any special fundraising activities that PSIA-AASI W does on behalf of EF will be done through prior agreement only, and any funds necessary, or PSIA-AASI W Regional Staff or other non-volunteer labor to run the activity will be paid for by EF.

## **20.2. Procedure.**

### **PSIA-AASI W and EF Communication Plan:**

The following is the communication plan between the PSIA-AASI W and the EF.

- The CEO, or a specified delegate of the CEO is the initial representative that the EF will communicate with for normal communication
- The President, or a delegate of the President, is the initial representative that the CEO will communicate with for normal communication
- At any time there is an issue with communication, reports or issues preventing EITHER organization to meet its obligations, the Chair and/or delegates of the Chair of PSIA-AASI W will be copied on the communication
- Likewise, with any meeting where issues need to be resolved, the following people will be included in that meeting at a minimum:
  - CEO and/or a delegate of the CEO
  - President, and/or a delegate of the President
  - Chair and/or a delegate of the Chair
- Monthly EF Board Meetings may be attended by the CEO and/or a delegate of the CEO

### **Scholarship Administration and Distribution of Scholarship Funds**

PSIA-AASI W responsibility:

1. Ensure online Scholarship application portal is up to date and automatically forwarding all applications to the EF.
2. Assign scholarship funds to applicants upon award of the Scholarship by the Scholarship Committee through AMS gift cards to be built in each recipients account in the amount determined by the Scholarship Committee
3. Participation in Scholarship committee meetings as available
4. Provide final invoice to EF for Scholarships used as tracked in Gift Cards spent by recipients

Scholarship Committee Responsibility:

1. Review of Scholarship applications
2. Notification of Scholarship award or rejection, along with the reason for the award or rejection
3. Follow-up with Scholarship recipients as requested by recipients or required by EF
4. Notification to PSIA-AASI W of any conflict of interest between Scholarship recipient and any entity of the PSIA-AASI W Board, EF or Scholarship Committee

### **Communications on Behalf of the EF to the PSIA-AASI W Membership**

Any communication on behalf of the EF to the Membership will be done by following PSIA-AASI W formats and protocols. This includes Website updates, E-Blasts and any other means of communication PSIA-AASI W does with Membership. E-Blasts and newsletters will be provided to ASEA according to their posting deadlines, the CEO will provide edits and give final approval prior to distribution to the membership. Any website updates must be submitted in writing and will be subject to final approval of the CEO. Approved website updates will be made with 10 business days.

### **Any other communication on Behalf of the EF by PSIA-AASI W**

Any other communication that is to be done by PSIA-AASI W on behalf of EF will be done through mutual agreed to format, deadlines and protocols.

### **Process for Grant Request from PSIA-AASI W to EF**

From time to time, PSIA-AASI W may request a grant from the EF in support of special programs, or in unusual financial situations, in support of the PSIA-AASI W Staff activities. The Grant Request will provide the following information to the EF for consideration:

- Introduction
- Proposal Summary
- Requested Support Funds with basis of estimate for support
- Who the funds will benefit, what the funds would be used for, including when and where
- Future Funding needed (if it is anticipated the funds may be requested again in the future, this should be noted and why)

### **References:**

- [PSIA-AASI W Bylaws adopted December 9, 2023 by the Membership](#)
- [PSIA-AASI W Board of Directors Governing Policies Manual revised by Board on May 23, 2023](#)
- [Operational Agreement between PSIA-AASI Western Region and the PSIA-AASI Western Region Education Foundation](#)