

# Seattle Snowshoeing Roster Retention Policy

Seattle Snowshoeing Committee

**Status:** Approved

## Contents

[Introduction](#)

[Retention Policy Summary](#)

[Qualifying Trips for Leader Activity](#)

[Considerations When Choosing Retention Policies](#)

[Determining Retention Policies](#)

[Leader Inactivity](#)

[Instructor Inactivity](#)

[Committee Member Inactivity](#)

[Overall Program Inactivity](#)

[Expiration of Mountaineers Membership](#)

[One-Time Policies Upon Adoption Of This Policy](#)

[Appendix: Leadership Maintenance Requirements of Other programs](#)

[Document History](#)

## Introduction

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

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

The remainder of the document is intended for readers who may want to understand the rationale behind the policy: [Considerations When Choosing Retention Policies](#) describes common criteria that are used to select the retention policies for each of the groups in the roster, and [Determining Retention Policies](#) applies the common criteria to each of the cases for which a retention policy is needed.

## Retention Policy Summary

The retention policy is summarized in the following table.

	<b>Policy</b>	<b>Criteria Weighting</b> (see <a href="#">Considerations When Choosing Retention Policies</a> )
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<b>Reason For Removal</b>	<b>Retention Window</b>	<b>Notify before removing?</b>	<b>Accuracy</b> (favors short window)	<b>Perishable Skills</b> (favors short window)	<b>Retention &amp; Recruiting</b> (favors long window)
<b>Leader Inactivity</b> (has not led or co-led a qualifying trip - see additional notes below)	3 years plus 1 year grace period	Y	Medium	High	High
<b>Instructor Inactivity</b>	4 years	N	Low	Medium	High
<b>Committee Member Inactivity</b>	1 year	Y	High	Low	N/A
<b>Expired Mountaineers Membership</b>	2 years	N	High	N/A	N/A

Notes:

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

## Qualifying Trips for Leader Activity

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

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

## Considerations When Choosing Retention Policies

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

- We want the roster to accurately reflect the current state of the program, i.e. we want the volunteers in the roster to be members who are currently active in the program. *This argues for a policy that removes inactive volunteers quickly.*
- We want a policy that welcomes volunteers back after a hiatus. Many Mountaineers members are active contributors for decades, but with lulls due to life events that may be unrelated to the Club or the outdoors (family, job, health). If a long-term member must take a year or two off to, say, focus on a career change or take care of a family member, when the member is ready to become active again we want to be sure that the member's previous program affiliations are still there. Put another way, we don't want long-term members to return only to find that they have been dropped from the programs for which they used to contribute. *This argues for a policy that removes inactive volunteers slowly.*
- Many of the skills required to lead trips and instruct at courses are perishable. For example, Leadership itself is a perishable skill. For some activities, the skills required to safely do the activity may also be perishable. Over time, Clubwide or programwide standards and best practices change, and the website is constantly being updated such that the details about how to set up and manage a trip sometimes change. *All of these perishable skills and knowledge argue for a policy that expires Leader and Instructor credentials after an extended period of inactivity.*

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

## Determining Retention Policies

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

In all cases below the policies recommend the time at which someone *may* be removed from the roster, but there may be reasons to leave a person on the roster longer, such as a special role

they have in the program or other circumstances unique to an individual. There may also be extenuating circumstances that affect many or all members on the roster, such as seasons where weather or other route conditions significantly reduce or even eliminate the ability to offer courses or trips (extreme high snow years, extreme low snow years, no-snow years, etc). In such cases it is up to the discretion of the Committee to decide whether to leave people on the roster longer. It is expected that such decisions will be weighted toward inclusion by leaving people on the roster longer when the decision is not clear cut.

## Leader Inactivity

**Recommended policy:** Retain membership in the Leader roster group for **three years** since the date of the most recent qualifying trip or other activity led or co-led by the volunteer. (See [Qualifying Trips for Leader Activity](#) above.) Before removing their Leader status, send a reminder email and allow them a grace period during which they can choose to lead a trip to “reset the counter” and retain their Leader status. The grace period is one year, with the intention that the leader be given until the end of either the current season (if the warning email is sent near the beginning of the season) or next season to lead a qualifying trip.

**Justification:** Trip leadership is something that requires significant commitment and investment of time to achieve and maintain, and we want to respect the time and effort the member has invested in becoming a trip leader. Moreover, trip leaders are critical to the success of any program, and *experienced* trip leaders even moreso; we want to do what we can to retain them and allow them to resume their leadership activities without placing unnecessary obstacles in their path. At the same time, we recognize that trip leadership is a perishable skill, therefore we don't want the retention period to be too long. Allowing a lull of up to 3 years seems like a reasonable compromise, especially considering that there will be an additional grace period at the end of that 3 year period.

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

## Instructor Inactivity

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

**Justification:** Even though the roster's Instructor group does not confer any special privileges to the volunteer, it still serves two very important purposes. First, it acts as a database of members who are not just potential instructors for future courses, but who are also candidates

for additional roles in the program. Put another way, it is a list of potential “up and comers”. Second, for many members it is the relationship that causes the program’s name to appear in the list of committees on their profile page (see image). Though this may not matter for some members, for others it helps establish a connection between the member and the program, and is also a sign of status for some members. Hence in some cases this increases the member’s satisfaction with the program, and can be a positive recruiting tool. This argues for a longer retention period than for most other committee roles.



## Committee Member Inactivity

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

**Justification:** A program’s list of active committee members is used very frequently in the normal course of operations for most programs. For example, it is the basis for group emails, meeting invitations, etc for the programs committee meetings, both regular and ad-hoc. It is important that it be kept up to date. Therefore we choose a much shorter expiration policy than for other roles in the roster. Most of the time the transition of someone on or off the committee is a well-known event and the roster is actively managed in real time when such an event occurs. Therefore we do not expect the passive expiration policy described here to be invoked very often, but rather it will end up being used as a fallback in case a bit of active roster maintenance is overlooked.

## Overall Program Inactivity

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

An exception to this policy can occur when a member is included in the roster for reasons other than one of the roles described by the roster groups. Sometimes a person can be included in a program’s roster for ad-hoc reasons, such as historical documentation (e.g. “Treasurer 2014-2016”), documentation of an external relationship (e.g. staff who wish to be included in group emails), etc. These special entries must be handled on an ad-hoc basis by the committee administrators, and are outside the scope of this policy.

## Expiration of Mountaineers Membership

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

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

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

## One-Time Policies Upon Adoption Of This Policy

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

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

## Appendix: Leadership Maintenance Requirements of Other programs

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

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

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

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

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

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

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

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

## Document History

June 16, 2020	Removed references to this document as a proposal. It was adopted and published in May, so is a proposal no more.
May 14, 2020	Approved by Committee.  Added new section <a href="#">Appendix: Leadership Maintenance Requirements of Other programs</a> .  As per reviewer feedback: 1) Added short paragraph to clarify that members can and should be allowed to stay on the roster under special circumstances, and 2) fixed some typos.
May 12, 2020	Initial draft sent to Snowshoeing Committee for review.