Students’ Council Handbook
University of Alberta Students’ Union
Discover Governance
(2017)
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ABOUT THE STUDENTS’ UNION

The University of Alberta Students’ Union (SU) is the official body that represents all undergraduate students and acts as a strong advocate for students at the university, and at all levels of government. We operate a variety of businesses intended to appeal to students (from bars and a deli, to a convenience store and a full service print shop), and provide access to a wide range of student services designed to meet the needs of all of our members. We also operate - and own - the Students’ Union Building, and run a budget of more than $10 million, with more than 200 staff.

The SU is a student-centric organization that is run by students for students, and prides itself on being a proactive organization that is sensitive to the needs of individuals and the student body as a whole. We are committed to ensuring that your education is affordable and of the highest quality, and that your experience is a very positive one.

Values of the SU:
• **Do what is right, not what’s easy**
  o We believe that acting with integrity and respect is essential to an open, collaborative, and democratic organization.
• **Inspire change for the world**
  o We strive to create a community where effective involvement shows students that they can change the world.
• **Act with unbridled compassion**
  o We help students make the most of any challenges they face by providing an inclusive and caring environment.
• **Always keep moving**
  o We adapt and innovate to meet the challenges and opportunities of our dynamic student environment.
• **Plan for tomorrow**
  o We act with future students in mind by making sustainable choices.

STUDENTS’ UNION STRATEGIC PLAN

The SU’s Strategic Plan helps define the long-term direction and priorities of the SU. The Mission: to serve, represent, and engage UofA undergraduate students to enrich their experience.

The Vision: a future where students feel accepted and welcome, thrive in a vibrant intellectual community, are empowered and confident, and contribute to society as active citizens and effective leaders.
ABOUT THE STUDENTS’ COUNCIL

Students’ Council is the ultimate authority in the Students’ Union. It consists of 40 members:
• The Speaker (non-voting)
• The President of the Students’ Union
• The four Vice-Presidents’ of the Students’ Union
• The Undergraduate Board of Governors Representative
• 32 Faculty Councillors (distributed on a representation by population principle).
• The General Manager (non-voting)

Together, these individuals are responsible for fulfilling the mandate of the Students' Union. This mandate comes from the Post Secondary Learning Act.

Meetings of Students’ Council are generally every second Tuesday at 6:00 PM. Meetings are open to the public except when Council moves in camera to discuss sensitive business. All meetings of the Council observe Robert's Rules of Order.

While Students’ Council has delegated some of its authority to its various committees, notably the Discipline, Interpretation, and Enforcement Board and the Executive Committee, it retains ultimate control and authority over the elected Executive Officers, all monies collected under its authority, and any subsidiary body created under its auspices. In short, all power, control and responsibility ultimately are vested in Council.

COMMITTEES OF THE STUDENTS’ COUNCIL

There are 6 subcommittees under the Students’ Council to assist Council in its work. These committees allow Council to greatly expand the amount of business it can deal with by carrying out delegated activities and refining suggested actions to be taken by Council:
Executive and Councillor Roles

EXECUTIVE ROLES

PRESIDENT OF THE STUDENTS UNION:

• Sits on the Board of Governors
• Talks to media and attends events

Supervises SU Affairs

• Chairs Executive Committee meetings
• Oversees projects of the Vice Presidents and track their progress
• Directs the activities of the General Manager

Heads Major Initiatives

• Chairs the Strategic Planning Committee
• Coordinates efforts on major projects like Fall Reading Week

VICE PRESIDENT ACADEMIC:

Internal Advocacy

• Sits on the General Faculties Council and most of its standing committees
• Coordinates advocacy activities as they relate to academic affairs

Faculty Associations

• Chairs the Council of Faculty Associations
• Responsible for ensuring FA compliance with Bylaw 8100
• Gives advocacy support on major faculty issues
• Advisory committee to the VPA
• Provides student input on advocacy activities
• Members act as delegates of the VPA to some committees

Academic Relations Group

VICE PRESIDENT EXTERNAL:

External Advocacy

• Sits on CAUS and CASA
• Advocates to Federal, Provincial, and Municipal governments
• Coordinates all external advocacy efforts

Council of Alberta University Students

• Chair of CAUS for the academic year
• Responsible for advocating on issues that affect all post secondary students in Alberta
COUNCILLOR ROLES

Being a Councillor with the Student’s Union brings with it its own responsibilities and rewards. As a Councillor it is necessary for you to develop working relationships with other Councillors and Executives, stay informed, seek information from the executives and be fully prepped for Council meetings. You are the connector between your students and the Students’ Union so be prepared to bring council awareness to developing issues on campus, keeping your constituents informed and engaged. Develop your understanding of the Students’ Union and maintain a respectful and welcoming Council environment.

In order to fulfill the role you have accepted you can make motions, ask questions, submit information items, strike committees or task forces, make legislative changes, raise awareness of issues, engage with constituents, engage with student groups and associations, and engage with councillors.

You are stewards of the Students’ Union and with a majority you can make changes to Council Standing Orders, Political Policy, Bylaws, and the Budget.
Here are some common myths and misconceptions about Council:

- **Executives lead Students' Council**
  - In Council, the Executives are on the same playing field as Councillors. It is a joint task to bring about the changes necessary for students.

- **Council is just here to hold executives accountable**
  - The GM (General Manager) is a member of Students’ Council to ensure that you know if they are being unaccountable. Council must also hold execs to their platform points, SU political policy and goals.

- **Councillors don't have any power**
  - As an individual you may only ask questions and vote. As a Council you have the power to make change happen.
  - Work as a team!

- **Someone else will bring it up/read this/make a motion/tell me what to do...**
  - You are an adult and a councillor. It up to you to be prepared/ask questions/make motions...
Robert’s Rules of Order

WHY USE ROBERT’S RULES OF ORDER?

A Brief Introduction to the Theory of Robert’s Rules of Order

Parliamentary law is a branch of common law that governs the proceedings of deliberative assemblies.1 Robert’s Rules of Order is a specific variant of parliamentary law that is both a theoretical basis and a ‘how-to’ guide for conducting business in democratically elected deliberative assemblies.

The theory underlying Robert’s Rules of Order is a balance between fundamental principles of parliamentary law:2

1. Protection of the rights of members, and those whom they represent.
   - All members represented by and serving on a deliberative assembly have the right for their views to be heard. This means
     - Advanced notice of meetings and motions is provided.
     - Agendas are created and circulated in advance.
     - Minutes are taken, so that accurate recordings of member views exist.
   - ‘Points’ exist so that members can ask questions that enable them to participate more fully (point of order, point of information, point of inquiry, etc).
   - Members who are absent have the right to attempt to have business reconsidered.
   - Quorum requirements seek to ensure that a vocal minority cannot ‘take over’ the business of an assembly.

2. The requirement for a deliberative process of full and free discussion as a prerequisite to democratic decision-making.
   - Every member is guaranteed at least one speaking turn.
   - Where needed, debate rotates between speakers for and speakers against.
   - Limiting debate in any fashion, including calling the question, requires a 2/3 majority.
   - Consensus is not required for a decision to be valid and binding.

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Those with strong views to the contrary need not feel like they must compromise their views to let the business of the organization go forward. They are, however, expected to respect the will of the assembly once a decision is made because they had a fair opportunity to convince the majority that they were right.

3. **Protection against instability.**

- It is always harder to reverse a decision than it was to make it in the first place.
- The Chair is always right about procedure, unless their ruling is successfully overturned by a vote of the assembly.
- Quorum requirements seek to ensure that an assembly does not vary in composition from one meeting to the next to the point that decisions made by one group are habitually overturned by the second.
- Minutes provide a record of business that serves as institutional memory for the organization in subsequent years.

All common parliamentary procedures are structured to serve the balance of these principles against the need to make timely decisions.

**Why use Rules at all?**

There are several common myths about parliamentary rules that tempt assemblies into ‘just having meetings.’ Below, we discuss four common myths about why groups shouldn’t use parliamentary procedure, as a way of explaining why they should.

1) **Using Robert’s Rules is inefficient. We should make decisions faster.**

The ‘fastest’ way to make decisions is to empower the President to do it, and let your organization be run by an annually elected dictator. That, however, is not a good idea.

Robert’s Rules of Order are actually quite efficient in the contexts of what kind of a process they’re intended to facilitate. They keep discussion focused on the decision that needs to be made, they encourage people to prepare in advance, and they ensure a balance between the speed of decisions and the openness of discussion. Open discussion helps an organization be more transparent and helps eliminate mistakes. It also lessens the chances of members becoming bitter with decisions they disagree with because they could see how and why the decision was made, and had the chance to participate themselves.

2) **Robert’s Rules generates unnecessary paperwork.**

Actually, Robert’s Rules generates necessary paperwork; namely agendas and minutes. That paperwork creates institutional memory for the organization, and allows people to participate in decision-making. It also creates a record that
ensures that decisions are enforceable. Plus, using motions to make decisions makes it easier for people to understand the outcomes of discussions that they were not present at.

3) **This particular section of Robert’s Rules doesn’t make any sense. We should just get rid of it.**
Parliamentary law has been evolving since the 1500s, with contributions from some of the greatest thinkers of our time. Four hundred years’ worth of world leaders from Thomas Jefferson to Winston Churchill have been using Robert’s Rules or its predecessors. It might need some tweaking to work for your organization, but don’t undertake to rewrite the rules from scratch without understanding them first.

4) **Robert’s Rules are too complicated. Isn’t it simpler to just have a meeting without all this rules business?**
Sometimes. Think of a Council as if it is a football team. A small group of people getting together to play football probably don’t need a lot of rules. Then again, they probably don’t have enough people to play a proper game. A large group of people playing football needs lots of rules so that everyone understands what’s going on, no one can cheat without others noticing, and the chances of someone getting hurt are minimized. A Council is the same way.

The decisions that are made by Council are at least as complex as the decisions made by a football team in the field, and are just as likely to cause tempers to flare. You need rules so that everyone is on the same page about what’s going on and are equipped to participate effectively so that no one can ‘cheat’ or pull the discussion really off-track, and so that people don’t get bullied or unfairly silenced. Meeting without rules is a recipe for chaos... and that won’t simplify things one bit.
### TABLES OF RULES RELATING TO MOTIONS

<table>
<thead>
<tr>
<th>Explanation of the Table</th>
<th>Undebatable</th>
<th>Open Main Question to Debate</th>
<th>Cannot be Amended</th>
<th>Cannot be Reconsidered</th>
<th>Requires a 2/3 Vote</th>
<th>Does not require to be Seconded</th>
<th>In Order when another has the floor</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>A star shows the rule heading the column in which it stands, applies to the motion opposite to which it is placed; a blank shows that the rule does not apply; a figure shows that the rule only partially applies, the figure referring to the note showing the limitations. Take, for example, “Lay on the Table,” the Table shows that 8 19 of the Pocket Manual treats of this motion; that it is “undebatable” and “cannot be amended;” and that an affirmative vote on it (as shown in note 5) “cannot be reconsidered;” a 2/3 vote,” that it does “require to be seconded,” and that it is not “in order when another member has the floor.”</td>
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<td>Adjourn</td>
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<td>(1) Every motion in this column has the effect of suspending some rule or established right deliberative assemblies, and therefore requires a two-thirds vote, unless a special rule to the contrary is adopted.</td>
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<tr>
<td>Adjourn, Fix the Time to which to Adjourn</td>
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<td>(2) Undebatable if made when another question is before the assembly.</td>
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<td>Amend</td>
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<td>(3) An Amendment may be either (1) by “adding” or (2) by “striking out” words or paragraphs; or (3) by “striking out certain words and inserting others;” or (4) by “substituting” a different motion on the same subject; or (5) by dividing the question” into two or more questions as specified by the mover, so as to get a separate vote on any particular point or points.</td>
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<td>Amend an Amendment</td>
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<td>(4) An appeal is undebatable only when relating to indecorum, or to transgressions of the rules of speaking, or to the priority of business, or when made while the Previous Question is pending. When debatable, only one speech from each member is permitted. On a tie vote the decision of the Chair is sustained.</td>
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<td>Amend the Rules</td>
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<td>(5) An affirmative vote on this motion cannot be reconsidered.</td>
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<td>Appeal, relating to indecorum</td>
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<td>(6) The objection can only be made when the question is first introduced, before debate.</td>
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<tr>
<td>Appeal, in all other areas</td>
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<td>(7) Allows of but limited debate upon the propriety of the postponement.</td>
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<td>Call to Order</td>
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<td>(8) The Previous Question, if adopted, cuts off debate and brings the assembly to a vote on the pending question only, except where the pending motion is an amendment or a motion to commit, when it also applies to the question to be amended or committed.</td>
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<td>Close Debate, motion to</td>
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<td>(9) Can be moved and entered on the record when another has he floor, but cannot interrupt business then before the assembly; must be made on the day, or the day after the original vote was taken, and by one who voted with the prevailing side.</td>
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<td>Commit to Refer</td>
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<td>Extend the Limits of Debate, motion to</td>
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<td>Fix the Time of which to Adjourn</td>
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<td>Leave to Continue Speaking after Indecorum</td>
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<td>Lay on the Table</td>
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<td>Limit Debate, motion to</td>
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<td>Objection to Consideration of a Question</td>
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<td>Orders of the Day, motion for the</td>
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<td>Postpone to a Certain Time</td>
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<td>Postpone Indefinitely</td>
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<td>Previous Question</td>
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<td>Priority of Business, questions relating to</td>
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<td>Privilege, Question of</td>
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<td>Reading Papers</td>
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<td>Reconsider a Debatable Questions</td>
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<td>Reconsider an Undebatable Question</td>
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<td>Refer (same as commit)</td>
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<td>Rescind</td>
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<td>Rise (in Committee equals Adjourn)</td>
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<td>Special Order, to make a</td>
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<td>Substitute (same s Amend)</td>
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<td>Suspend the Rules</td>
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<td>Take from the Table</td>
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<td>Take up a Question out of its Proper Order</td>
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<td>Withdrawal if a Motion</td>
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**IN-CAMERA DISCUSSION FAQ**

What does it mean to ‘go in camera’?
- ‘In camera’ means to go into confidential or secret session (literally, whatever is discussed cannot leave the room). For all intents and purposes, going in camera and moving into executive session are basically the same thing.

How do you make a meeting go in camera?
- Using *Robert’s Rules*, a motion to go in camera is undisputable, is in order as long as you don’t interrupt someone who already has the floor, and requires a simple majority to pass. To get out of in camera is the same motion except you move out of in camera instead of into it.

What, exactly, is covered by the confidentiality of in camera proceedings?
- The *proceedings – everything that was discussed.*
  - Every single thing that happened in the meeting after it was moved in camera is confidential, often including the discussion itself.
- What in camera doesn’t cover:
  - Things that were already public.
    - For example, if you talked about the 1967 World Series while in camera, the fact that the Red Sox lost doesn’t suddenly become confidential. What you can’t discuss is the fact you talked about it while in camera.
  - Your opinion
    - If you think that *The Empire Strikes Back* is the best of the Star Wars films and say so in camera, the fact that you believe that doesn’t become a secret. However, you can’t disclose that you shared this opinion while in camera.
  - The behaviour of the people who aren’t in the room
    - If your group is in camera discussing negotiations with a third party organization and that organization disclose things about your in camera proceedings, that doesn’t automatically mean they did something wrong. Most importantly, if someone else spills your group’s secrets, that does NOT necessarily mean that you are now free to discuss in camera proceedings publically also.
- Always err on the side of caution. If you are unsure of whether something is in camera or not.

Should we take minutes when we’re in camera?
- Yes! In camera minute should be stored separately from your public minutes and only accessible to members who were privy to the in camera session.
Can a body move motions in camera?

- **Yes**, but only if the motions made in camera only affect people who are privy to the secrecy of the proceedings.
- Some organizations operate entirely in camera (ex. Fraternities and Sororities)
- However, all motions made by the **Students' Council** of the University of Alberta are public. Although a motion may be made in camera at one of these meetings, the motion itself will be published with the minutes. This is due to the fact that the organization’s rules stipulate that all motions are automatically public (Standing Orders of the Students’ Council, Part 18).

Can I discuss in camera proceedings with people outside of the meeting?

- **Yes**, but only if they’re a member of the body that went in camera or they were specifically authorized to hear about the in camera proceedings. You **cannot** talk to anyone else about what was discussed.

Isn’t it always bad for a democratic body to do things in secret?

- **No**. All organizations will occasionally need the ability to have private discussions. Certain issues, such as conversations about intra-group conflicts, member discipline, private personal information related to group business (e.g. executive health, academic, or family issues), discussions about ongoing legal proceedings, or other kinds of sensitive negotiations require more candid, confidential conversations and, consequently, a more limited audience than is afforded in more public forums. Quite often, the early part of a discussion needs to be handled in camera to share the facts on a ‘need-to-know basis’ so that everyone involved has the information they need to make a public decision later down the road. Robert’s Rules places no limits on the content of in camera discussion except suggesting that some things must always be handled in executive session (e.g. member discipline). **However**, in camera session, like any tool, is open to abuse. The decision to move your group in camera should always be made carefully. Except in very specific organizational contexts (e.g. fraternities and sororities), in camera should not be the default setting for your group’s discussions.

Can in camera proceedings be retroactively made public?

- **Yes**. If you want to take a motion that was moved in camera and make it public, the easiest way to do that is to write the original motion with a condition in it that, once fulfilled, makes the motion public.
- For either minutes or motions, the easiest way to make things retroactively public is to move a new motion specifying which motion or which part of the in-camera proceedings you would like to see made public. That motion is handled the same as any other main motion.
• **However**, making proceedings that are not recorded in the minutes public may not be possible. You should consult with your own organizational rules before trying to retroactively publicize proceedings.

**What happens if I do disclose in camera proceedings?**

• **Very Bad Things.** You can face disciplinary action. Depending on the severity of the breach that could include anything from censure to fines to expulsion. You may even be sued or charged with a criminal offence.

• You also breach the trust of your organization and the other members of your group, which almost always severely damages its ability to operate effectively. You may also cause other kinds of damage, such as opening your organization to being sued or causing resignations of other members who feel like they’ve been professionally compromised by your actions.

• **Don’t breach confidentiality. It’s a bad idea.**

**SIMPLIFIED GLOSSARY**

*The Basic Debate Process:*

**MOTION:** the ‘unit of business’ debated by an assembly

**MAIN MOTIONS:** must be seconded and are debatable, amendable, and reconsider-able. They are the motions to which all other motions react.

**ALL OTHER MOTIONS:** There are 86 kinds of motion that can be made under Robert’s Rules of Order, including more than one kind of main motion. They act on the business of the assembly in different ways.

**DEBATE:** a structured discussion about a motion

To enter debate, a member must be recognized by the **CHAIR** as **HAVING THE FLOOR.** They then have a limited time to speak, and must stay on topic and respect **DECORUM.**

Debate proceeds with one speaker for and one speaker against until the motion is put to a **VOTE.**

**AMENDMENT:** a formal process used to propose changes to motions

Only certain types of motions can be amended.

**VOTE:** mechanism by which an assembly decides whether to support a proposed motion

When put to a vote, motions **PASS** or **FAIL**

A motion that **PASSES** has a majority in favour, and is **CARRIED** or **ADOPTED,** meaning it is carried out.
A motion that **FAILS** does not have a majority in favour. The motion is not acted upon by the organization.

*Other Key Terms (Alphabetical)*

**CHAIR:** the person who is responsible for ensuring that the rules are observed
A Chairperson may be voting or non-voting.
Though a Chairperson may be able to participate in discussion if they are a voting member, their primary responsibility is to facilitate the meeting by enforcing the rules, and so they must be **IMPARTIAL**.

**DECORUM:** practices & customs that ensure debate is carried on in a respectable and orderly manner
Debate is confined to the merits of the MOTION before the assembly.
Members refer to one another respectfully, often in third person and without use of first names.
Members do not attack the motives of one another.
Members do not interrupt one another or disturb the assembly.
Members do not speak against their own motions.
Members do not speak badly of business that has already been concluded.

**POINTS:** type of motion that allows a member to ask a question and/or interrupt debate on a matter of procedural urgency

**REQUEST FOR/POINT OF INFORMATION:** a member asks a question not related to procedure of another member (including the Chair). This point cannot interrupt a speaker.

**POINT OF ORDER:** a member believes that proper procedure is not being followed and brings it to the attention of the Chair and the assembly. This point can interrupt a speaker, but must be raised as soon as possible after the infringement.

**POINT OF PARLIAMENTARY INQUIRY:** a member asks a question related to procedure. This point cannot interrupt a speaker, and must be directed to the Chair.

**POINT OF PRIVILEGE:** something is occurring that is preventing a member from participating in the debate. This point can interrupt a speaker. It cannot be used if one simply disagrees with what is being said or feels slighted.
SU Bylaw and Policy

Bylaw Example:
- Bylaw 100: Outlines the overall structure and procedures of Students’ Council
- Bylaw 8100: Governs how we oversee Faculty Associations

Policy Example:
- Mandatory non-instructional fee policy: outlines what the Executive must advocate for when fees are being considered
- Public transit policy: outlines how the Executive must advocate in regards to the U-Pass

Bill to Bylaw:

IDEA
- Research
- Consultation
- Edits & Drafting

1st READING
- Council debates principles of idea

DRAFTING
- Bylaw/Policy Committee creates first draft

2nd READING
- Council debates new bylaw/policy
- May go back to committee several times

BYLAW/ POLICY
- The idea has now become a bylaw or policy
- Same process used for amendments
Asking Effective Questions

Asking questions is easy.

Asking **GOOD** questions is hard.

Important components of a good question:
- Preparation
- Understanding of the issue
- An idea of the outcome you want

Before you ask
- Has it been answered already? PAY ATTENTION!
- Why are you asking the question?
- What kind of answer are you looking for?
- Is it a discussion or action item?
- Would it be better to email/ask your question in advance?

Strategies
- Prepare well and have background knowledge.
- Be respectful – tone is important
- Draw from own expertise – use class skills to structure good questions and develop awareness of assumptions of the question
- Listen carefully – for understanding and to avoid repetition
- Practice makes perfect

Question theory
- Open vs Closed
  - Open: Why, How, What
  - Closed: When, Where, Who, Which
- Factual, evaluative, or interpretive
  - Factual: Hard data or clarification
  - Evaluative: assessment of strengths, weaknesses, or progress
  - Interpretive: Opinions or speculation
- Hypothesis testing and leading questions
  - Asking questions you already know an answer to in order to
    - Get information
    - Lead the discussion in a directions
- Convergent vs Divergent
  - Convergent: 1 answer, simple
  - Divergent: may have many answers
Strategic Planning

What is Strategic Planning?

Strategic Planning is an organizational process that establishes a common sense of what the organization is planning to do and when and how they are going to do it.

It is beneficial because:
• It helps people deeply understand and articulate a shared vision for their organization, which ultimately strengthens the organization; and
• When done well, a strategic plan can guide an organization over a much longer term than more informal, individualized visions.

Development Process

Getting Started:
• Organizational carrying capacity
  o How likely is it that a 30+ page strategic document will be read, never mind implemented from year to year?
  o Will a 5-page summary be enough, or will it be so concise/vague cause the intent and meaning of the document to be lost?
  o How many hours of volunteer time can you reasonably spend on this realistically?
• Strike a balance between planning and constraining
  o Planning helps, constraining hurts, especially in organizations with elected officers.
  o Your successors need the plan to be flexible enough to accommodate their goals to.
• How much consulting do you need to do?
  o You need enough to ensure that the document has legitimacy and buy-in, but not too much as it will encumber the process unnecessarily.

Getting the Team Together
• Executive members tend to be very busy with their other responsibilities especially in volunteer organizations. They also represent a very narrow cross-section of members who will have a stake in the strategic planning process.
• Many professional organizations hire a strategic planning consultant but this can be very expensive and mostly likely outside of the budget. Instead, look at having a Strategic Planning Committee with student volunteers.

Timeline
• Set deadlines! Stick to them!
Strategic Analysis
• Understanding where you want to go must be based on understanding where you are.
• There are several strategic analysis tools freely available online.
• Conduct a SWOT – Strengths, Weaknesses, Opportunities and Strengths analysis

Consultation Framework
• Seeking feedback and input on your strategic plan is important. Plan out:
  o WHO you would like to seek feedback from
  o WHAT specific feedback you want
  o WHEN during the process you are going to seek it out
• Potential groups to consult with:
  o Strategic Planning Working Group or Subcommittee
  o Current executive and/or Council members
  o Past executives and/or Council members, in an advisory capacity
  o General membership
  o Key stakeholders such as the Dean’s office, professional organizations, etc.

Key Components

Mission
• What is the organization’s purpose and focus? Some guidance for this is provided in the legal framework that established FAs (SU Bylaw 8100 & 8200).

Values
• What principles does the organization stand for? What standards of behaviour does it set for itself?

Vision
• The vision defines the future state that the organization’s strategic plan will guide the organization towards.

Critical Success Factors
• Those things that must go right, individually and collectively, in order for the organization to achieve its vision and mission.

Goals and Objectives
• These are the action items of the plan
• Many strategic planning exercises develop a SMARTER approach to setting goals and objectives:
Specific
Measurable
Aligned with the central functions of the organization
Realistic
Time-bound
Extending the capabilities of the organization and its personnel
Rewarding for the organization and its personnel to pursue

Strategic Goals
• These are the “big picture” achievements being sought after for the long term.
• Although they are big picture, they still need to be SMARTER and clear.

Strategic Objectives
• These are more tangible, often shorter-term action items that work together towards strategic goals. Strategic objectives may serve more than one strategic goal.

Accountability Framework
• It is beneficial to consider and implement at least one of the following structures:
  o Institutionalized and regularly scheduled progress reviews
  o Making the document ‘official’, in the constitution or job descriptions
  o Plans for redeveloping the strategic plans

Refresh Cycle
• If your strategic plan is successful, your organization will grow and change. It is a good idea to give strategic plans a “shelf life” so that people review them instead of abandoning them.
Strategic Planning Activity

Consider the following while thinking through the format for a strategic plan.

I) INTRODUCTION

II) BACKGROUND STATEMENT / HISTORY

III) ORGANIZATIONAL VALUES/VISION/MISSION

IV) SWOT ANALYSIS

a. STRENGTHS

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<th>External</th>
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b. WEAKNESSES

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c. OPPORTUNITIES

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d. THREATS

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<th>External</th>
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</table>
V)   GOALS, PLANNED ACCOMPLISHMENTS, AND STRATEGIES


VI)  SPECIFIC OBJECTIVES

i. To..... (achieve something)

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<tr>
<th>Strategy</th>
<th>Action Step</th>
<th>Person(s)</th>
<th>Year</th>
<th>Completion</th>
<th>Evaluation</th>
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<tr>
<td>(list the strategy)</td>
<td>(steps to achieve said strategy)</td>
<td>(who is involved?)</td>
<td>(when?)</td>
<td>(timeline)</td>
<td>(how and by whom?)</td>
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VII)  MONITORING AND REVIEW


VIII) EVALUATION


IX)  ANNUAL PLAN


X) ATTACHMENTS (if any)


23
Advocacy Guide

What is Advocacy?
- A broad set of tactics used to influence a decision often political in nature.

It can involve:
- Gaining support for a cause
- Raising public awareness
- Lobbying executives or fellow councillors
- Changing attitudes or practices
- Maintaining the status quo
- Putting a new decision on the table
TIP: Advocacy should always reflect your goals and resources:

Can Councillors Advocate?
- Yes! However, because Students’ Council is a policy board, Councillor advocacy looks a little different and is directed entirely inward
- Inward-facing advocacy
  o Councillors can lobby SU Executives to make decisions or support initiatives
  o Councillors can advocate to SU Executives and each other on important decisions coming through Council
  o Advocacy should be policy centered
TIP: You cannot, as an individual, tell the SU what to do
- Outward-facing advocacy
  o Council as a whole can direct the SU’s advocacy efforts by creating Political Policy
  o All advocacy from the SU to outside bodies, be the University, government, or otherwise, is handled by the SU Executives.
TIP: Outward = anything not directly controlled by the SU

How to Advocate:
1. Determine your position – carefully think out and have an official position
   a. What’s best for your constituents? (Make a list of needs vs. wants)
   b. What’s best for your organization?
2. Engage members – being backed by membership feedback gains legitimacy
3. Education – informed memberships will be more involved
   a. Online – use mass e-mails, social media – fast and easy but not always effective
   b. In person – better explanations with instant feedback and is impactful
   c. Advertising – inform constituents of events and reaches wider audience
4. Consultation (crucial part of advocacy) – prioritize and direct your advocacy efforts, determine pressing issues, represent members accurately and legitimate your position
   a. Surveys – consistent and measurable data from many people at once, data is quantitative than qualitative and can be tracked.
   b. Plebiscites and Referenda – more official and provides a clear mandate from students. Referenda are binding, plebiscites are not.
c. **Focus Groups** – more quantitative and in-depth and directly represents opinions of members at large

d. **Collaborative Projects** – more qualitative and anonymous than focus groups while providing visual representation of member opinion

e. **Engage sub-groups** – Meet with DAs/Pas/ clubs/international students.

f. **General Meetings** – hold one at least per fall/winter semester to share annual plans and budgets, spread info and gain early feedback on upcoming issues

g. **Town Halls** – spread info, get feedback, and a public show of consultative effort.

5. **Lobbying** – this is your opportunity to directly reach decision makers and get immediate feedback while negotiating for better decisions.

a. **Lobbying Methods:**
   
   i. **Topic Expert:** build a reputation of providing good info and insight. This is built gradually with planning, data management and good transition.
   
   ii. **Sales Pitch:** focus on demonstrating something the person is missing or should consider and sell them the solution.

b. **Meetings** – know the issue and your objective; be neat, presentable, polite and personal; arrive early; directly ask for what you want, listen carefully to their response and take notes; leave information and follow up afterwards.

c. **Phone Calls** – shorter and less personal but are a good way to set up meetings, gather info quickly/follow up afterwards; less effective than meetings in person.

d. **Letters and E-mails** – these should be used to publicly state a position, set up meetings, or follow up after a meeting, one-on-one meetings are best when possible.

6. **Protest** – raise awareness and create public pressure with large numbers of people showing public support and drawing media attention. Be aware: if these are handled poorly it can damage reputation.

a. **Preparation** – know your goals and communicate them to protesters and chose the location smartly.

b. **Advertising** – social media and word of mouth are the best for engaging people; contact media outlets; send out reminders!

c. **Holding a Protest** – Communicating clear, simple goals will help a protest stay on track; provide signs and materials; stay safe and arrange security if necessary!

7. **Representation** – automatic, easy access to decision-makers

a. **Students Council and Standing Committees**
   
   i. Ask the right questions to make statements and sway votes
   
   ii. Sit on committees

b. **Some Fas have seats for their Councillors**

c. **Attend town halls or AGMS held by Fas, the SU, your faculty, or the University**
   
   i. Get informed, participate, and gather feedback

8. **Advertise Yourself** – e-mail, social media, posters, paid ads, tabling, and class talks

9. **Keep Records** – this will help future executives advocate better on similar issues!

a. File important correspondence

b. Outline the issue, who was involved, what you did, what was effective/not, and update it as you go.
Types of Advocacy and when to use them:

**Lobbying**
- Meetings
- Phone calls
- e-mails

Direct communication intended to influence decisions or put new decisions on the table. Direct and powerful, but also difficult and intimidating.

**Media**
- Social Media
- Newspaper
- Television
- Interviews
- Online videos

Use when you need to get the word out or put public pressure on someone, and you need to do it quickly.

**Advertising**
- Paid ads
- Newsletters
- Posters/Handbills
- Tabling
- Class talks

Less urgent. Use for finding participants for focus groups or committees, or to direct constituents to more info about an issue.

**Protest**
- Marches
- Sit ins
- Walk outs
- Boycotts

Use to visually show wider community support for or against a current issue, and to publicly pressure for a certain outcome.

**Petitions**
- Paper
- Online 'E-mail

Use to show quantifiable support or opposition to a particular issue, change, or question.

**Consultation**
- surveys
- Plebiscites/Referenda
- Focus Groups
- AGMs
- Town Halls
- Collaborative Projects

Consultation can simultaneously show you what you should be advocating for and give you materials with which to advocate or lobby.
Advocacy Activity

Consider the following prior to advocating:

I) DESCRIBE YOUR ISSUE/CONCERN AND YOUR METHOD TO RESOLVE IT:
   CAUSE – know what is the root of your situation
   EFFECT – what is it that you aim to change
   ISSUE – create a summary statement

II) IDENTIFY THE POSITIVES AND NEGATIVES – what are the risks and rewards of
    advocating for a certain issue

III) RESEARCH – always have background knowledge! Identify elements related to
     your issue and how they affect it – be able to identify CRITICAL ARGUMENTS

I) IDENTIFY WHO HAS AUTHORITY ON THE ISSUE – who are you going to have to
   advocate to and who could aid in helping you with background information
   and resources – BUILD RELATIONSHIPS

I) PICK A METHOD TO USE – ie. Lobbying, Petitions, etc)

I) BACKUP – if you receive an unsatisfactory response from your initial method,
   what will be your backup
Conflict resolution is an important part of being able to reach constructive decisions. The following information has been based off the Emerging Leaders Program Conflict Resolution presentation.

The Thomas-Kilmann assessment graph below shows different conflict modes:

**Dealing with Conflict**

- **Difficult Conversations:** “Anything you find hard to talk about”
  - Consider:
    - What are the facts
    - What are the feelings
    - What does it mean to me, to my identity
    - Both parties have different perspectives... equally true to each

- **Listening Fundamentals**
  - **Attend**
  - **Affirm**
    - “And” Stance
      - Don’t choose between stories; embrace both
      - Can assert your views without diminishing theirs
• “I understand how hurt you are AND that you think I should’ve been more clear AND I don’t think that makes me a bad person AND....”

• “I” Statements
  • The best “I” statement is free of expectations
  • It is a clean, clear statement of how it is from your side and how you’d like it to be
  • “I felt disappointed and confused when you didn’t call me when you were in town. I would like to spend more time with you.”

  o Empower

• Conflict Tips:
  o Practice!
  o Talk to a third party
  o Meet on neutral ground
  o Include food
  o Take a break if it gets tense
  o Include a third party
  o Keep communication open
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<th>TERM</th>
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<td>ALES</td>
<td>Agriculture, Life, and Environmental Sciences</td>
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<td>Discipline, Interpretation and Enforcement Board</td>
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<td>NSSA</td>
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<td>NSSE</td>
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<td>P/VP</td>
<td>Provost and Vice President Academic</td>
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<td>PAW Centre</td>
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<td>SU Award for Leadership in Undergraduate Teaching Exce</td>
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<td>University of Alberta Policies and Procedures on Line</td>
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<td>VPA</td>
<td>Vice President Academic</td>
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<td>VPOF</td>
<td>Vice President Operations and Finance</td>
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<td>VPSL</td>
<td>Vice President Student Life</td>
</tr>
<tr>
<td>VPX</td>
<td>Vice President External</td>
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