

A Review of the Membership of the Federation of Students
in the Ontario Undergraduate Student Alliance

Executive Summary:

A Letter From the Committee

To the members of the Education Advisory Council and the Federation of Students Students' Council,

We, the Membership Review Panel have concluded our report on membership of the Federation of Students in the Ontario Undergraduate Student Alliance (OUSA), which began in August of 2018. This work was originally scheduled for conclusion in December or January, and has been completed significantly later than originally scheduled. The creation of methodology and the level of detail included was important to the panel, and is part of the reason why this work was delayed.

The panel recommends continued membership in the Ontario Undergraduate Student Alliance. More detail on this recommendation can be found in Section XXI of this report.

The methodology of this report was developed by the Vice President, Education, and approved by the panel after feedback and edit. The work was then conducted, predominantly by the Vice President, and the report was compiled using the agreed upon structure for the report. The committee had access to all documents throughout the writing process, and provided comments on the section. We encourage you read the disclaimer found on page 3.

The committee's report fulfills the required analysis under Council Procedure 23, in Sections V-XIV, finding OUSA generally meets these expectations. As requested by procedure, the report attempts to approximate financial return on investment under Section XX, which the panel finds is positive within our rudimentary methodology. The report also explored potential policy conflicts between OUSA and the Federation of Students in Section XV finding no major conflicts.

The report delivers a SWOT analysis in Sections XVI-XIX based on findings throughout the report. The panel finds that OUSA has strengths in its research and government relations capacity, as well as the student. The panel finds that the current weaknesses of OUSA are with member engagement and visibility. There exist opportunities to address some of these weaknesses. Upon observing the potential threats to OUSA as an organization, both a financial threat as a result of the Student Choice Initiative, and risk to continued relevance with the PC government are both identified. The panel has not chosen to comment with high levels on specificity for actions to be

undertaken in the SWOT analysis, but provides some of that commentary throughout the report.

Our report includes recommendations for improvement of OUSA, that we emphasize while may not be an impediment to our membership currently, we urge OUSA to ensure these problems to not become chronic. A consolidated list of recommendations may be found in Appendix C. We have additionally provided a small number of discussion questions for consideration at EAC that we did not feel qualified to make a judgement on.

The panel notes that multiple members will be in attendance for the discussion at the Education Advisory Council and Students' Council meetings to assist in interpretation of the report.

We hope that the report is well received and that the Federation follow our recommended course of action. We hope our analysis has assisted to shed light on the relationship between OUSA and the Federation, and that such an analysis is beneficial for the use of the Federation in determining any action it decides to undertake.

Sincerely on behalf of the review panel,



Matthew Gerrits
Vice President, Education
Federation of Students, University of Waterloo

Quick Reference Acronym & Abbreviation Guide

CFS-O- Canadian Federation of Students-Ontario

ED- Executive Director of OUSA

Feds- Federation of Students

GA- OUSA General Assembly

MPP- Member of Provincial Parliament

OUSA- Ontario Undergraduate Student Alliance

PSE- Post-secondary Education

SC- OUSA Steering Committee

VPEd- Vice President, Education

DISCLAIMER:

It should be noted that almost all material and work in this report was conducted primarily by the Vice President Education. While multiple opportunities were provided for greater contributions to members, the immensity of the project culminated in the Vice President completing most work. While there was no other way in which to complete the project within the current timescale, the reader should be aware that all portions of this report, with the exception of Section XXI and Appendix A were written primarily by the Vice President, and will carry whatever bias entailed therein. The panel has had multiple opportunities to provide comment, and has done so in multiple occasions, and subsequent edits were made. The panel encourages readers to exercise adequate scrutiny and critical thought when considering this report and its conclusions.

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Section I: Review Information

- i) Organization under Review:
 - Ontario Undergraduate Student Alliance (OUSA)

- ii) Members of Review Committee:
 - Matthew Gerrits, *Chair*

 - Austin Richard
 - Connor Plante
 - Katie Arnold
 - Masha Samuel
 - Tomson Tran, *Members*

 - Aisha Shibli, *Resource Member*

- iii) Review Framework

The Review framework was agreed to by the panel, and will be revisited and revised for a subsequent recommendation for future reviews. The sections in this report broadly reflect the sections outlined in the framework, with some departures and minor changes to what information was or wasn't included.

Section II: Overview of Organization

i) Historical Information

The Ontario Undergraduate Student Alliance (OUSA) was founded in 1992 as a loose alliance of student unions creating consensus-approved policy for the provincial post-secondary policy agenda. This alliance was made permanent by incorporation under the *Ontario Corporations Act* in 1994, in which the Federation of Students (Feds) was a founding member.

OUSA has continued in existence with changing memberships since 1994 and has seen institutionalization with the hiring of a permanent staff complement, development of processes and an annual calendar of events, and the establishment of a policy library and system of policy formation.

OUSA currently has a membership of eight student associations, and represents approximately 500 000 undergraduates in the province of Ontario.

ii) Purpose, Vision & Mission

OUSA's purpose is to present a united front on issues that affect Ontario's undergraduate students in order to more effectively lobby the provincial government for change.

OUSA's vision is accessible, affordable, accountable and high quality post-secondary education in Ontario.

OUSA's mission is to:

- Conduct research to identify issues affecting the accessibility, affordability, accountability and quality of undergraduate education in Ontario
- Develop credible and constructive policy to address these challenges
- Lobby the government to affect their undergraduate education policy
- Organize campaigns to effectively articulate the needs and interests of its members
- Communicate research and policy to both educate and affect the opinions of stakeholders, Ontarians and government
- Build partnerships in the post-secondary education realm to accomplish its vision.

iii) Governance Structure

OUSA is governed by its By-law #1, which lays out the purpose, membership structure, and roles and responsibilities of parties involved with OUSA.

OUSA's membership are all Full Member Associations, which must be mutually exclusive in their memberships. Membership is not transferable. Membership admission is determined by the Steering Committee (SC) upon application of a prospective Member Association, provided the Member Association has made the requisite approval by whatever means are specified by itself. For admission, the Member Association also signs a membership contract and delivers the requisite membership fee. Continued membership is assumed, unless the Member Association chooses to withdraw in a manner consistent with its bylaws, or by resolution of the SC in a process outlined in the By-law.

Members are entitled to one Director on the SC and to send delegates to each General Assembly (GA) as proportioned by the bylaw. Members are represented by their delegates, proportioned based on size of undergraduate population. The purpose of General Assemblies are to deliberate on policy resolutions, receive and review financial documentation, and to deliberate any changes to the bylaws or operating procedure.

The Board of Directors function under the *Ontario Corporations Act* is filled by a Steering Committee. The Steering Committee is comprised of one Director/Steering Committee Member, appointed by their respective Member Association. The eligibility to be an SC Member is to meet the requirements of being a Director as laid out in the *Ontario Corporations Act*, must be a member of the Member Association's student government, and must not be a permanent staff member of the Member Association. The ED is a non-voting resource member of the SC. Upon approval by SC, there may also be non-voting associate resource members from prospective members, or from existing members.

The Steering Committee comprises a hybrid working/administrative board, setting both strategic and operational goals, and contributing to the work of the organization through, research, policy-creation, member engagement, other writing tasks, and other duties from time to time in addition to other Board activities such as governance, fiscal oversight and HR.

The Steering Committee elects from among its Directors three officers; the President, who serves as spokesperson, signing officer and Chair; Vice-President (Finance), who serves as President in absence of the President in accordance with the By-Law, creates the budget, and serves as a signing officer; and the Vice-President (Administration and Human Resources), who serves as President in the absence of the other Officers, as corporate secretary, on each hiring committee, conducts performance evaluations, and is expected to maintain a high level of familiarity with organizational operation policy.

The Steering Committee sets direction and is responsible for maintaining efficient operation of the organization, primarily via direction given to the ED. The

Steering Committee's powers to set direction are given via the *Ontario Corporations Act*, and are primarily exercised via authority over the annual budget, authority to amend and approve the annual plan of the organization, and by delegation of certain HR, financial and other duties to the officers of OUSA.

The operation of OUSA is conducted via the Home Office (HO) Staff, led by an Executive Director (ED), who reports to SC, and is managed by the President of OUSA.

iv) Staff and Roles

The staff complement of OUSA has varied over time. The permanent original HO staff comprised of four individuals, was for a time at five individuals, and is now again at four individuals.

All staff report to the *Executive Director (ED)*, who is the only staff member whose role is outlined in the By-Law. The Executive Director's responsibilities include management of staff, maintenance of accounting records, safekeeping records and data, and other duties as specified by SC, which typically also includes stakeholder meetings with government and non-government stakeholders.

To conduct logistical, outreach and PR functions, OUSA also has an *Operations & Communications Director*, responsible for organizing OUSA events, creation and distribution of physical and digital marketing materials, content management on the OUSA website, and social media matters.

To fulfill the research function of OUSA, and to provide assistance to SC members and General Assemblies in development of policy, OUSA has two *Research & Policy Analysts (RPA)*. The research and policy analysts are responsible for maintaining a current knowledge of policy and events in the post-secondary sector in and beyond Ontario, serve in preparation of research packs for student authors, and provide research support upon request and availability should an SC member ask for it.

Staff are typically hired on two or three year contracts, and employees do not typically serve more than one contract at OUSA. While OUSA does not discriminate in hiring, this standard is typically understood to be in place to allow for new employees to bring new ideas to the organization, and to allow frequent opportunities for new graduates who may have recent experience in the student association sector the opportunity to apply.

OUSA maintains HR procedures in its operating policy, and includes descriptions of types of leave, expectations surrounding working hours, expensing guidelines, benefits, discipline and conflict of interest guidelines, among others.

Section III: Overview of Services

i) Overview:

The ED was asked to provide the panel with an overview of the services that OUSA provides to students. Each of the sections will give a brief overview of indicators in each section and subsection. This section provides a list and some activities of the services OUSA claims to provide. More in depth explanations and findings of each can be found in Section V.

ii) Government and External Relations

This covers the relationship building capacity of OUSA, which is required to advance policy among potential allies and decision makers.

1. *Non-government Stakeholder Relations*

- Joint Projects
- Coordination of priorities
- Cross presentation at conferences

2. *Government Stakeholder Relations/Lobbying*

- Facilitating meetings between student executives and government officials or politicians
- Presence during transition of governments or of roles
- Relationships with political parties
- Relationships with political staffers
- Relationships with MPPs
- Relationships with bureaucrats

iii) Communications and Outreach

This covers the capacity of OUSA to disseminate information and generate narratives.

1. *Communications to Universities*

- Joint Projects
- Coordination of priorities
- Cross presentation at conferences

2. *Social Media Communication*

- Facilitating meetings between student executives and government officials or politicians
- Presence during transition of governments or of roles
- Relationships with political parties
- Relationships with political staffers

- Relationships with MPPs
- Relationships with bureaucrats

3. *Traditional Media Communication*

- Newsprint
- Website
- Email

4. *Campaigns*

5. *Blog*

iv) Internal Operations and Finance

This covers some miscellaneous services that do not fall under other categories.

1. Internship Program

2. Development of internal policies to better respond to students, such as the Indigenization Report recently published to take some attempts to decolonize some of OUSA's processes to make OUSA steering committee more familiar with the Indigenous history of Ontario, and how they can take steps to avoid overlooking Indigenous issues in their advocacy.

v) Research

This represents the capacity of OUSA to generate and collect knowledge required for effective stakeholder relations or policy writing.

1. *Primary Research*

- Qualitative interviews for publishing of independent reports, such as the summer 2018 intern capstone project, as well as to inform research packs
- Quantitative research in the form of the Ontario Post-Secondary Student Survey, conducted biennially

2. *Secondary Research*

- Various forms of collection of secondary research into research packs and to support other research requests from members

vi) Policy & Publications

This represents the ability of OUSA to mobilize knowledge into presentable and professional information.

1. Policy

- 6 student-written policy papers annually
- Annual Pre-budget submission
- Other briefs or submissions as appropriate
- Briefs on annual priorities for distribution during student advocacy week

2. Publications

- Annual edition of *Habitats*, a magazine on Town and Gown issues
- *Shared Perspectives*, a title that is used for collaborations with stakeholder partners
- Miscellaneous publications

vii) Conferences, Events & Professional Development

This represents the ability of OUSA to hold centralized events and provide professional development.

1. Campus Visits

- Meetings with university administrators
- Direct student engagement
- Presentation to governing bodies

2. Professional Development

- Transition Days
- Welcome Conference
- Best Practice Sharing Days
- Training Day

3. Internally Oriented Events

- Strategic Planning Conference
- General Assemblies
- Student Advocacy Week

4. Externally Oriented Events

- Policy Symposium
- Partners in Higher Education Dinner
- Alumni Events and Mentorship

Section IV: Inputs

i) Introduction

This section briefly explores the inputs required of the Federation to enable membership in OUSA. The time analysis was conducted by the Vice President Education, and the amounts for financial contributions were pulled from the time analysis and the Federation of Students Students' Council budget for 2018-2019.

ii) Time

The VPEd was asked to conduct a time audit, approximating the amount of time spent and expected to be spent this year as a result/requisite of OUSA involvement. Two major time categories were identified, time on campus and time off campus, and translated into a work day equivalent per year. Approximate number of work days in an executive year are 250. Calculations of time do not account for opportunity cost for hours used on OUSA, due to computational complexity.

1. Off Campus

Table III.1: Estimated Days Out-of-Office for OUSA Activities

MONTH	NUMBER OF DAYS**	INCLUDED*
May	2	Welcome Days
June	4	Strategic Planning Conference
July	1	SC Meeting
August	4	Think Tanks, Policy Symposium, Best Practice Sharing Day
September	1	Training Day
October	1	SC Meeting
November	5	General Assembly + Strategic Planning Conference
December	1	SC Meeting
January	3	SC Meeting+PD Event+Think Tanks***
February	2	SC Meeting
March	1	SC Meeting
April	2	Transition Days
Total	27	

*In any month where "SC Meeting not included, presumed to be a part of other events

** Does not include weekends

*** Generally expected that an SC member will participate in one external event in a year

2. On Campus

Table III.2: Estimated Time Spent in Office for OUSA Activities

Activity	Time Spent (hrs/y)
Coordination and Execution of Campus Visits	5
Agenda Review & SC Meeting Prep	12
Committee Work*	25
Policy Research/Writing	40
Other Research & Writing	15
PSSSP Administration and Promotion	2
Delegate Prep	10
Semi Annual GA Prep	3
Campaign Administration	8
Total	120
Workday Equivalent	17

*Based on time spent this year on OUSA Strategic Planning Committee, may be higher than to be expected in future years.

3. Time-Money Equivalence

For a general comparison of cost, the amount of workdays spent by the VPEd can be converted into a financial cost by prorating the VPEd's salary based on the proportion of time spent on OUSA work. It should be noted that this presumes a 35 hour workweek on the part of the VPEd, which is not historically accurate, an assumption of more hours worked per week would lead to a lower cost, however, a higher, more conservative figure was chosen.

Workdays Spent for OUSA Work	44
Workdays in VPEd Term	250
Total % of VPEd contract hours spent on OUSA	17.6%

VPEd Salary, 2018	\$48 277.60
17.6% of VPEd Salary, 2018	\$8 496.86

iii) Financial Contributions

Membership in OUSA requires expenses as well. This section attempts to identify money in the Feds budget spent on OUSA, whether directly through membership fees, or indirectly through other registration fees, meetings, transportation, or other costs. Costing was estimated using data from the budgets of the last two completed fiscal years, exempting membership fees, for which the most recent estimate is used. Almost all Executive travel is related to OUSA, all other OUSA costs are pulled from the OUSA budget section, except the previously calculated salary contribution.

Table III.3: Estimated All-In Cost for OUSA Participation

Nature of Expense	Feds Budget Line	Amount (000s)
OUSA Membership Fee	41400-66050	98
Executive Travel	40100-66030	5
Delegate Fees and GA Costs	41400-66030	11
Partners in Higher Education Dinner	41400-70010	2
Time Cost of Executive Salary	40100-64010	8
Total		124

To calculate the approximate cost per student, a figure of approximately 31 000 students is used for convenience in calculation. The current full-time equivalent amount is currently closer to 32 000, but as stated above, some of the costs were incurred when there was a smaller student population, again for a more conservative figure.

Table III.4: Estimated Cost Per Student for OUSA Participation, 2018-19

Approximate Cost of OUSA	\$ 124 000
Approximate Full-time Equivalent	31 000
Feds Membership	
Approximate Cost Per Student	\$ 4.00

This represents the estimated financial contribution of an average student to OUSA and to OUSA-related Feds activity per year, incorporative of executive salary, prorated.

Section V: OUSA Outputs

i) Overview

The Panel asked for a description of services provided by OUSA in Section III, in this section the Panel will review how well OUSA is performing in those stated areas. For each section, the Panel reviewed whether performance in each area is satisfactory in achieving goals, and whether the performance is in line with what Feds considers necessary for an effective presence on the provincial scale. Current metrics are provided where such details are not considered sensitive, however, the Panel has had the opportunity to view metrics for all areas, unless stated otherwise. Any recommendations for improvement for OUSA in any of these action areas is also provided. The scale is as follows, 1=Unacceptable and Requiring Urgent Correction 2=Requiring Improvement 3=Adequate 4=Exceeds Expectations

Note, questions were given on a tight turnaround time by the VP Education to Home Office, during a time while they were short staffed, and in the middle of a political crisis surrounding three major PSE policy announcements.

ii) Government and External Relations

1. *Non-government Stakeholder Relations*

Findings: OUSA and former OUSA Executive Director Sophie Helpard provided a list of non-governmental stakeholders, including 7 identified stakeholders that are met with monthly, as well as 17 more stakeholders met with quarterly. The organizations cut across arms-length agencies, faculty groups, other student groups, PSE roundtables, health organizations, and others. Executive Director Helpard notes this is not a comprehensive list, but it seems to be a list of the most regular contacts.

Upon asking for a list of shared projects, OUSA provided a list of 5 types of joint projects within the last 18 months, including the *In It Together* publication on mental health, the *Shared Perspectives* publication on Sexual Violence, joint budget submissions, and presentations at external conferences. Very few listed stakeholders had not been involved in some form of joint project.

When asked, OUSA provided an in-depth justification of how they maintain and grow these relationships, as well as outlining when they will not be open to collaboration. They also included an explanation that the way they interact with the stakeholders varies based on the stakeholder, and that OUSA attempts to be adaptive in how it pursues these relationships.

Rating: 3. OUSA demonstrates an adequate understanding of how to form and build relationships, as well as a demonstrated proficiency in execution by note of their regular contact list and list of recent joint projects.

Recommendations: None.

2. *Government Stakeholder Relations*

Findings: OUSA notes that most government stakeholder relations are political rather than bureaucratic in nature. It maintains relationships with MPPs and political staffers across all four elected parties in the legislature. Among civil service contacts are largely contacts within the Ministry of Training, Colleges and Universities.

OUSA counts among its largest legislative relationships those with MPP David Piccini (Parliamentary Assistant to the Minister of Training, Colleges and Universities), MPP Stephen Lecce (Parliamentary Assistant of Infrastructure and Parliamentary Assistant to the Premier), multiple members of the current Liberal Caucus including former MAESD Minister Mitzie Hunter, NDP MPP Chris Glover (MTCU Critic) and NDP MPP Peggy Sattler. At times, MPPs will reach out to Home Office to ask questions about PSE policy and OUSA stances.

Relationships are maintained by regularly touching base with policy stances, and interaction at conferences and government announcements. Christmas cards are both sent and received.

OUSA gets approximately 50-70 MPP meetings each advocacy week. Each year, approximately 16 student leaders Compared to other student groups, the College Student Alliance only meets for half the time and therefore receives fewer meetings, and CFS-O does not typically publish details about the success of their regular advocacy week. This number represents meetings with approximately one-half of all MPPs. Meetings cut across all parties, and proportion will vary from year to year.

Action as a result of these partnerships could be expanded to include all policy achievements OUSA claims in PSE, states the OUSA answer to the Panel's question. These victories can fall into funding announcements, regulatory changes and involvement in implementation decisions on the government end. In the opposition, OUSA occasionally uses relationships to communicate with government members on priorities, an example was cited on an NDP member asking a question on the order paper to gain clarification on the terminology surrounding targeted free tuition, leading to a public release of documentation and data.

When asked if there was a targeting strategy for growing legislative relationships, OUSA mentioned its cross-party approach, and its focus on members who express interest in PSE, but otherwise do not state a particular strategy.

Meetings with staffers happened weekly with government when the Liberal government was in power, and had quarterly meetings with some MPPs. This has not been possible after the change in government, and OUSA used its SC meeting with the Minister as an opportunity to have discussions where home office could not.

When analyzing access, OUSA notes that our calls are generally welcomed by the parliamentary assistant, Minister's staff, the NDP and Liberal MTCU critics, and other MPPs. Outreach to the Minister's office has improved from the first 6 months of the PC government when emails were not generally being substantively returned.

Rating: 3. OUSA demonstrates an adequate understanding of building relationships with government. The access demonstrated by OUSA with the previous government was impressive, and inroads to the current government seem to be productive. Access vastly outstrips the only other provincial university student alliance. demonstration of usage of built relationships is adequate.

Recommendations: None.

iii) Communications and Outreach

1. *Communications to Universities*

Findings: OUSA maintains relationships with member association's respective university administrations. The Panel did not ask significant questions to this end.

Rating: 3. OUSA was not solicited for feedback on this point. VP Education Matt Gerrits notes that the university administration has a positive reception to OUSA, remembers OUSA by name, and the President and the AVP Government Relations both had positive opinions of the former OUSA Executive Director Sophie Helpard when he discussed OUSA and her with the university, demonstrating that these relationships are alive and well. The university has also suggested using OUSA as a vehicle to coordinate responses to the Students' Choice Initiative by bringing together associations and administrations, demonstrating these relationships leading to positive outcomes.

Recommendations: None.

2. *Social Media Communication*

Findings: When asked, OUSA notes that density of platform presence is variable, and usually sees higher amounts of engagement on Twitter than Instagram or Facebook, OUSA's three primary platforms. The amount of tweets during a campaign, around government announcements and during conferences generally meets or exceeds one per day.

All OUSA social media flows through one person, the Director of Communications and Operations, but material is crowdsourced. Wording is generally determined by the Director, but is sometimes brainstormed or edited with the rest of Home Office.

Over the 91 day period from last May to last July, OUSA tweets received 169 retweets (avg. 1.85/day), 85 thousand impressions, 1.5% engagement on impressions (avg. 14 engagements per day), 408 likes, 10 replies.

Data on Facebook and Instagram was not provided. It was asked for on short notice, but was not included in response.

OUSA designates its targets for each platform as the same, being for both students and stakeholders.

Rating: 3. OUSA has active social media, including regular uploading of content, and a designated manager. The Panel is providing some recommendations to lead to a better rating in the future.

Recommendations:

The Director of Communications and Operations should create an annual report for Steering Committee, including a breakdown of statistics on social media during a designated time period. This will insure that comparable and longitudinal information is on hand for strategic discussions.

The Panel recommends that OUSA increases its articulation of the specificity and segmentation of target markets for each of its platforms. This will help OUSA further specialize its tone and presence on each platform.

3. *Traditional Media Communication*

Findings: The OUSA website generated 52,572 pageviews and 43,323 unique pageviews an average of 118 unique views per day, in the May 2017-May 2018 year. The website is updated whenever staff or steering committee membership changes. OUSA Home Office conducts monthly reviews to attempt to locate any mistakes in the website and rectify them. The panel does notice that there are details which are overlooked with regards to updates, including updates to changes in Steering Committee membership or posting of SC agendas.

The largest drivers of website traffic are OUSA press releases and posts, especially when shared by student leaders. Release of large publications also leads to spikes in views.

OUSA generally appears in newspapers whenever there are provincial policy decisions on post-secondary education. OUSA typically appears in *Academica Top 10*, an influential PSE publication, approximately 5 times a year, or approximately 0.2% of their news articles. The Panel verified that OUSA did appear in *Academica* 5 times in 2018, 7 times in 2017, and 8 times in 2016. VP Education Matt Gerrits

wishes to draw attention to the fact that half of 2018 was relatively devoid of Ontario PSE announcements.

OUSA does not have data on hand on radio appearances, but is making efforts to increase appearances and presence on radio. OUSA provided proactively notes on work with a strategic partner to help develop radio presence.

OUSA has approximately 1400 subscribers on its email mailing list, and approximately 5-8 people unsubscribe with each email sent out, or a 0.4% attrition rate.

OUSA says it has not received any complaints about navigability of its website in the time that the current Director has been in her role. OUSA does provide avenues for feedback that could be used, and are frequently used for other means, but have not been used to complain about navigation.

Rating: 3. Represented in a variety of areas, the panel would hope for more data availability to verify claims going further.

Recommendations:

The Panel recommends that statistics around *Academica Top 10*, website usage, radio appearances, newspaper appearances, and other media engagements be included in an annual report to steering committee.

4. *Campaigns*

Findings: Campaigns are brainstormed by Steering Committee at the Strategic Planning conference, and the themes are decided on. The plan is then operationalized over the next month. This can include a new tool that is being developed, which is an integrated communications plan that is executed by each member campus to help campaigns succeed. Plans include a campaign overview, a timeline, social media tactics, and assets. Final dates are determined by SC.

Campaigns are becoming more strategic as OUSA is implementing measures of social media performance for each. This project is still in development.

Recent campaigns include *Textbook Broke*, which saw 581k impressions over 20 days, 200 engagements, 136 retweets, 5439 post reach on Facebook, 1632 post impressions on Instagram and 1086 likes. The website had 1040 visitors as a result of links from the campaign, 899 who had never before visited the website. OUSA also makes a campaign out of its Student Advocacy week.

When asked about recent campaigns, OUSA stated that *Textbook Broke* met its goals in January 2018, but failed in September, partially due to some schools such as *Feds* opting to not participate due to exceptional circumstances. OUSA's *Students Vote* campaign also did not meet the intended number of signups to vote. It received

1104. This was during June when most schools were not in active school terms, making the campaign difficult.

Expenditure on campaigns is variable depending on amount of swag for students, which OUSA has found leads to greater engagement from students. OUSA did not provide data to substantiate this claim, but was not explicitly asked for it.

OUSA determines success of a campaign generally through engagement numbers over social media analytics and/or actions taken. Over the last 4 years, OUSA ran a number of campaigns, one on Tution in 2015, Work-Integrated Learning in 2016, one on provincial election student engagement in June of 2018, and two on Open Educational Resources in 2018.

OUSA, when asked to provide examples of campaigns translating to action did not provide any. They did provide links of uptake in traditional media, suggesting systematic tracking was occurring. VP Education Matt Gerrits notes that shortly after the Work-Integrated Learning campaign, the government did announce the Ontario Career Ready Fund, however, he has no evidence of a causal linkage.

Rating: 3. The Panel finds that OUSA is capable of running some far reaching campaigns. Campaigns seem to undergo a strategic planning process, and rollout and operationalization of plans is professional and sophisticated. The Panel commends OUSA for sharing that some campaigns did not make their stated goals.

Recommendations: More comprehensive tracking of outcomes from campaigns and costs of campaigns should be conducted to help with strategic decision making surrounding future campaigns.

OUSA should provide a more systemic and early system of determining campaign dates for member associations to fill out.

5. *Blog*

Findings: The OUSA blog had 1354 unique pageviews from May 2017 - May 2018, with an average page visit time of 1m 4s. Composition of the type of readers is not possible with the analytics software used by OUSA.

The decisions around who can write OUSA blogs is generally devolved to local SC members, who are also expected to be responsible for promotion, recruitment, approval of topic and initial edits. Students are generally expected not to write contrary to OUSA policy but are not discouraged from writing on institutional policies or other areas where OUSA has no policy.

Current barriers to student access would generally sit with the Sc member and not OUSA. However, SC members do not have many supports in recruiting members or supports for informing authors on style other than pointing to example.

Of the most recent 16 blogs not written by staff or doing rote introductions, the composition of authorship is as follows:

Table V.1: OUSA Blog Contributions

School	Blog Posts Authored
Brock	0
Laurentian	1
Laurier	2
McMaster	3.5
Queens	5
Trent	0
Waterloo	3.5
Western	1

Blogs are written on a rough schedule, and each school is given equal opportunity to contribute through that schedule. OUSA generally does not turn down offers of extra or timely blog posts.

Rating: 3. This area of output is an important component of allowing development of student authors, and aligns with OUSA's goals of thought-leadership. See recommendation for improvement.

Recommendations:

OUSA should generate both a "Blog Writing Best Practices" document, and a Blog post style guide, similar to the style guide provide to student authors for policy papers. This would allow SC members to better convince students that they are capable of writing a blog post.

OUSA RPAs should generate a list of undercovered topics that student authors could be recommended to write on.

iv) Internal Operations & Finance

1. *Internship Program*

Findings:

The Internship program is offered to 1, or recently 2, students each summer, to help them develop skills related to OUSA operations. Hiring is conducted by Home Office, with promotion going out over social media, LinkedIn, and through each SC member.

The interns are work-driven, given opportunities to advance writing skills, take on specific projects, some of their own initiative, get exposure to current student leaders, and have exposure to a small office environment. For example, this year's research intern completed a capstone research report on the effects of high-fee, high-aid PSE models on marginalized communities. The communications intern typically works on implementation of campaigns.

Over the last 4 years interns 5 interns have been hired, from the following schools:

Table V.2: OUSA Internships over the last 4 years

School	Interns
Brock	0
Laurentian	0
Laurier	0
McMaster	2
Queens	0
Trent	0
Waterloo	0
Western	3

OUSA Home Office notes that they see a direct correlation between how much each member campus promotes our internship, and who gets hired. Most years, an active SC member will promote the internship, and then the applicant pool will be filled by students from that institution. Some years we've had no applicants from certain member schools. The time at which the internship is advertised can cause barriers for Waterloo students who may be looking for jobs in January and February more than March.

OUSA interns do an exit interview and have had no noteworthy (in the opinion of Home Office) negative opinions of the experience, and in the opinion of the Panel, it seems that feedback is taken seriously and engaged with.

Outcomes of each internship and an exit blog are distributed via the OUSA blog page.

Rating: 2. While the value of the intern program is not seriously in question, the Panel finds that the distribution of hiring is problematic, and requires rectification. The Panel recognizes that this is a problem partially due to Feds' SC members promotion, however has provided a few recommendations where it would like to see improvement.

Recommendations:

OUSA should have a discussion at Steering Committee on how to ensure the internship opportunities are communicated, and if there are any ways for OUSA's Home Office to support a more wide distribution of hires.

OUSA should promote the internship opportunity and conduct the process in February when more Waterloo students would be able to apply.

2. *Internal Procedure Development*

Findings: OUSA develops procedures to codify expectations and workplace procedures. Procedures include those on etiquette, work schedules, pay, expensing and financial controls, communications, whistleblowing, and ethical research.

Useful things to encode in procedure are generally identified either by the Executive Director or SC. There is no timeline for review of procedure.

Rating: 3. Existence of procedure is important for codification of critical office place norms. The Panel is pleased that this is a tool that OUSA has developed. The Panel notes a lack of systematic review of procedures and encourages the Steering Committee to consider the recommendation below.

Recommendations:

The Steering Committee should have a discussion about systematic review of procedure, and implement some process to ensure that procedures are reviewed every 2-4 years. The panel identifies this as a task that could potentially be delegated to the VP Human Resources & Administration.

v) **Communications and Outreach**

1. *Primary Research*

Findings: OUSA conducts two main regular forms of primary research, consultation with marginalized student groups, and the Ontario Post-Secondary Students Survey (OPSSS).

The OPSSS is conducted on each member campus every other year, and in the most recent iteration had 8000-9000 respondents out of a population of approximately

150 000 students (5% response rate). Results from each school are returned to each SC member for their use. OPSSS cross tabulation data or detailed analysis is generally conducted only by OUSA staff for reasons of research ethics. Qualifications of researchers to conduct his research is drawn from educational qualifications, formal training, in-field practice, and is only conducted after finishing TCPS2 Core. Data is generally turned around in the counteryear to the survey.

OPSSS is promoted both by the student associations, but also through central OUSA promotion.

OUSA also conducts research of marginalized communities, usually using snowball sampling and in a recent case interviewing up to 20 people in these interviews. Interviews are qualitatively coded and analyzed. Research on each marginalized group varies depending on the group with regards to timelines and methods.

Research priorities are determined by paper rotation, ongoing research priorities, and home office consultation with steering committee before starting major research initiatives. The paper rotation is generally guessed upon expiry of papers and research is generally co-ordinated to reflect papers expiring. VP Education Matt Gerrits notes that expiring papers are usually renewed, and so this timing represents strategic research planning.

Primary research is analyzed in a combination of Excel, SPSS and NVivo.

Rating: 3. This represents a high volume of primary research, but with room for improvement in OPSSS response rates.

Recommendations: None.

2. *Secondary Research*

Findings: OUSA's main form of secondary research is research packs for OUSA policy papers. These are essentially literature reviews from both formal and gray literature on thematic topics. These are provided to student authors to assist in the structuring and writing of OUSA policy paper drafts. Additional secondary research is conducted whenever OUSA makes a publication, is called on for a consultation, or upon request of an SC member.

OUSA was asked but did not give a quantitative answer, to the breakdown of time spent on primary versus secondary research. Answers noted that this depends on policy papers in question, what phase of OPSSS is in progress, and the availability of research for research packs.

OUSA, when asked about whether they had access to paid sources of information answered no, but that it is something that they may be considering going forward, if there are funds available to do so.

When asked whether there is a significant amount of secondary research that is collected and not used, OUSA did not have a specific answer, noting that secondary research frames policy papers. VP Education Gerrits notes that authors are given freedom to use or not use material.

Rating: 3. Secondary research is being done at a level which enables efficient policy development. The panel has no specific recommendations, however encourages OUSA to continue work on making secondary research efficient.

Recommendations: None.

vi) Policy & Publications

1. Policy

Findings: When asked, OUSA noted that it maintains a rotating policy library, containing policies regarding provincially-oriented evidence-backed policy recommendations, structured with principles, concerns and recommendations which are renewed every four years. The length varies from about 10 to 70 pages long.

Policies, once approved by the general assembly, get final copyediting and are distributed to targeted stakeholders. Distribution is done through a mailing list, events, advisory committees, working groups, and directly through email. Stakeholders will often ask follow up questions.

When asked if OUSA was aware of any stakeholders who read policy papers in their entirety, they communicated their understanding that there are people within the Ministry who read policies in their entirety, and that topic specific stakeholders will also do so on occasions.

Each paper contains approximately 30 recommendations, with a lot of variance from paper to paper. Recommendations are typically backed up with citations, approximately 2 or 3 per section, again with variance.

When asked how politicians interact with recommendations, OUSA referenced that some MPPs engage directly and read policies directly. For example, a private member's bill put forward by MPP Sattler was inspired by an OUSA policy paper without proactive outreach on the part of OUSA. Governing ministers will more likely have policy staff engage with OUSA policy papers. Those in power will often inform OUSA that they agree with principles, but cannot go as far as we ask in many of our policies, such as increase to base operating funding being turned down after the increased investment in OSAP.

The Canadian Federation of Students and the Canadian Alliance of Student Associations both also put out policies, CASA's are typically a PCR format, but more expositional and have a higher level of production value. CASA consulted with OUSA

on OUSA's PCR structure when CASA adopted their PCR structure. CFS policies typically are a list of “for” and “against” statements, without significant body text, with some of the space in body text being filled by more extensive research/policy reports. Because OUSA policies are passed by General Assembly on a more firm timeline and are not significantly editable post-approval, it is more difficult to create polished, graphic-heavy and specially formatted policies.

When asked what pieces of policy make it into OUSA budget submissions, Executive Director Helphard answered that this is usually done in coordination with the OUSA president based on the current political landscape. Home office then works on the draft and it is approved by steering committee. Budget submissions do have limitations in that they are usually constrained to financial asks.

Rating: 3. OUSA's policies seem well regarded and well received. Additional focus on OUSA policy quality could be explored. Creation of graphics, visualizations and formatting could be understood to be an element to be completed post general-assembly, and could be an area member associations could lend support.

Recommendations:

OUSA should revisit the format of its policies to see if a more visually appealing and graphic-heavy format could and should be used, and if so how it should be implemented. This task should be overseen by the Steering Committee and could be a project for a summer intern with design skills.

2. Publications

Findings: OUSA puts out its publications to help drive messaging and cover some issues more in-depth. When asked why OUSA publishes *Habitats* if its municipally focused, OUSA answered that many of the municipal issues have provincial overlap, and that Steering Committee has traditionally supported, especially as it gives more students the opportunity to publish.

When asked about target audiences, OUSA clearly identified its target audiences for *Habitats*, *Educated Solutions*, and *Shared Perspectives*. It did not identify an audience for *In It Together*, the other irregular publication alongside *Shared Perspectives*.

OUSA shared that *Educated Solutions* is the most widely printed, with about 10 copies distributed to each campus and many to the ministry as well. OUSA did not identify where copies of the other two are distributed.

OUSA when asked shared that there is usually positive reaction on these publications, and they will sometimes be brought up in lobby meetings by staffers or MPPs who had read the publications.

When inquiring about cost, OUSA shared that approximately 3000 dollars are spent on publications through the entire year. They did not provide a cost/copy, which was requested.

OUSA clearly articulated that as a research-driven organization, that these publications serve an important role in pushing research findings, establishing credibility, providing opportunity for further action, help connect with stakeholders, and occasionally help publish student research as well.

When asked about staff time commitment, OUSA relayed each publication has a lead staff member, that the duties are interspersed with other office duties, but generally take about 3 months of coordinating student or stakeholder participation and submission of pieces of the publications, and communications generally takes an additional week on formatting.

Rating: 3. Clear purpose is shown as to why publications are used. Better availability of cost/copy, as well as time spent on each project, even if in a rough estimate.

Recommendations: None.

vii) Conferences, Events & Professional Development

1. *Campus Visits*

Findings: OUSA conducts campus visits once or twice per year to member campuses. The first is generally obligatory and the second visit is generally upon request of the member/SC member.

When asked about cost to travel to a campus, OUSA replied that quantification is difficult based on which city is being travelled to, how many staff are attending, how many meals must be expensed, whether the trip requires overnight accommodation, and whether trips are done back-to-back. They did provide figures based on more expensive trips, with further overnight trips incurring costs of approximately 135 dollars per hotel room plus up to 200 dollars in travel when considering mileage on SC member's vehicles. The total travel budget for OUSA is between 2000 and 3000 dollars per year.

Campus visits typically include organizing meetings with the President of the university, meeting with the AP Students, government relations staff, campus bookstore to talk about Open Educational Resources, the association marketing department and research staff, and also have some form of swag to be shared directly with students. OUSA will also attempt to interact directly with a governing body, whether that be a board of directors or a representative council. Typically OUSA staff will bring materials but rely on student volunteers for direct interaction. They will interact with student volunteers to discuss OUSA and how to interact with interested students.

When asked for metrics on campus visits, OUSA referenced that there was a checklist of activities that are generally desired, but it is typically up to the student association to create opportunities for OUSA to act with. Students are asked to sign up for a newsletter, but specific targets are not set for each visit due to varying student association sizes.

When asked to identify the value of campus visits, OUSA provided the explanation that it generally stems from expectations of members that OUSA do direct on campus engagement. From OUSA's end, they also communicated that it provides an important avenue for communication of best practices with full-time staff.

Rating: 2. While there are improvements to be made in engagement to be referenced further in this report, the status of campus visits is currently considered adequate.

Recommendations: OUSA should develop a form for questions to be asked in advance by Council members to frame the details of the presentation to the information requested by the member association.

OUSA should provide an explicit motivation for each activity conducted during campus visits, and revisit the concept of campus visits at Steering Committee to determine if they are effectively furthering the organization's goals.

2. *Professional Development*

Findings: OUSA runs a number of opportunities for professional development for Home Office as well as for SC members. There are a wide range of opportunities that OUSA refers to for HO professional development, training sessions, conferences, online courses and more. Some areas of focus for Steering Committee have been opportunities to develop public speaking skills, management, language skills and data collection skills. SC professional development usually focuses on training sessions and mentorship, though conferences are occasionally used as a dual ambassadorship/learning opportunity for SC members.

When asked if there was a specific strategy for what professional development is pursued in OUSA, OUSA replied that planning for professional development generally relied on the Executive Director working with other employees to chart a plan for professional development, and that strategy is coordinated on an individual rather than office basis. Approval of professional development is approved by the ED in the case of any Home Office staff, except for the ED themselves, who are approved by the president. Cost allocations are decided by the approver. SC members wanting to attend an event for professional development and having ambassadorship of OUSA would qualify for up to 50% of travel costs and registration costs could be fully covered, SC professional development is approved by the President. Total PD funding available to each staff member is 1500 dollars per year, per their contract as a benefit.

When asked about use of professional development, OUSA provided a list of recent expenditures including membership in a public affairs association, public speaking courses, courses in event management, public administration certificate, online data courses, French classes and conferences for SC members, and SC use “Our Better Selves”, a training developed by Trevor Mayoh, an SC alumnus, and who provides the training on time management, communication and goal setting pro bono.

OUSA also provides in-house professional development events through facilitating the training sessions and alumni mentorships.

When asked, OUSA relayed that PD is done outside of work hours or through use of lieu time.

Professional development of non-SC and non-HO persons is covered in the *Internally Oriented Events* section.

When asked if there was any monitoring of PD learning outcomes by OUSA, OUSA noted that learning outcomes are self-directed, but that OUSA engages in use of feedback forms, and that PD is discussed during performance reviews. The goal is to have PD be customizable.

Rating: 3. Professional Development reveals that use of professional development dollars is largely in line with job descriptions and though there is not an overarching strategy to develop home office skills, the short time frame of staff contracts means that PD is probably best optimized by a staff-driven utilization of professional development. PD is done on staff’s own time, meaning that less accountability is required, however the panel suggests that mandatory short reflections and summarizations of acquired skills be submitted by each staff member after completing each PD opportunity.

Recommendations: SC should develop a procedure related to professional development which requires staff to fill out a minimum one page reflection on their PD experience and skills required, for both record-keeping and for the benefit of their supervisor.

3. *Internally Oriented Events*

Findings: Events included here include welcome days, transition days, strategy conference, best practice sharing day and training day. These collectively make up OUSA’s internally run events focused on professional development and yearly advocacy planning.

When asked to summarize each event, VP Gerrits summarized as follows. Welcome Days- This is an opportunity to lay out the schedule for the year, observe the public session of a steering committee meeting, and be introduced to some of the PD that will be happening throughout the year. Transition days- A chance to rehash some

details from welcome days, as well as to do roundtables with some key stakeholders to actually build connections with the stakeholders. Strategy conference- A chance for bonding, analysis of the current political climate, narrative crafting, goal selection, campaign selection, further training and PD, specifically some limited anti-oppression training. Best Practice Sharing Day- A chance to fulfill one of OUSA's objects, to help facilitate communication between student unions, this event lets executives share their practices and brainstorm solutions. Training Day- A chance for student researchers and commissioners to come together and learn about policy writing and research.

Success is tracked via attendance as well as feedback forms circulated to all attendees after the event. Home office also completes a debrief after each event, with associated gradual improvement methods to improve the events for the future. While there are no success metrics, the feedback collected allows for gradual improvement.

Rating: 3. Events seem to run efficiently, but should be systematically reviewed and connected with learning outcomes to demonstrate that participants are not only satisfied, but that the events are fulfilling their function.

Recommendations: The Director of Communications and Operations should revisit all feedback forms and edit them to ensure that they are able to assess whether attendees met learning objectives for the events.

Steering Committee and Home Office should consider the possibility of merging best-practice sharing day and training day to see if such a merger would be feasible and advantageous.

4. *Externally Oriented Events*

Findings: OUSA also runs external events, such as the Partners in Higher Education dinner (PiHED). This is meant according to OUSA to be a signature event that bringing people together from across the sector, recognizes the contributions of Steering Committee, spreads word about OUSA, engages with politicians, highlights policy goals, and recognizes contributions of alumni. The focus on Steering Committee has been decreased somewhat in last years to make the event more purposeful in achieving OUSA's goals. Success for PiHED is tracked similarly as internal events, with attendance and feedback. PiHED is typically budgeted at approximately 20000 dollars, but in the last two years has cost between 10 and 15 thousand dollars compared to 15-25 in the years preceding that. Feds did not ask for specific attendance numbers, but VP Education Matt Gerrits estimates that this amount covers a Toronto downtown venue and sit-down meal for between 200-300 attendees, as well as physical teaching awards, a guest speaker, and any other associated expenses not including transportation of delegations from schools.

OUSA also runs alumni events to help facilitate a culture of keeping alumni involved and connected with OUSA, giving OUSA useful connections both in and beyond the public sector. Events include an alumni holiday party in November, run at a bookable restaurant room in Toronto, and recently a second annual event has been added in August to align with a Steering Committee meeting. These events are generally tracked by attendance and OUSA claims that they build camaraderie across party lines and across temporal divides, making both for more willing allies and more effective SC members through mentoring.

OUSA also runs a policy symposium, the first one ran in 2018, which also tries to disseminate policy goals for the year by inviting sector stakeholders to a set of panel discussions. The 2018 iteration focused on student health and wellness, technology enabled learning and experiential learning, each panel having a combination of OUSA representation and external stakeholders, to an audience of both government and non-government stakeholders. This format is common with other stakeholders and OUSA wanted to emulate. The August timing of this symposium also gave OUSA SC members some extra information and the opportunity to test-drive some narratives in advance of lobbying in November. Success was tracked through attendance and feedback forms.

Rating: 3. OUSA external events seem to both be well-oiled, and expansionary without any significant increase in budget. The panel recommends better success metrics, even if it is refining and recording attendance records.

Recommendations: Tracking of attendance at OUSA PiHED should be collected by OUSA and track the type of organizations or attendees in attendance.

The OUSA ED or Director of Communications and Operations should monitor the overlap of alumni between the two alumni events to ensure that having two events effectively extends OUSA's influence.

Section VI: OUSA Advocacy Priorities

i) Overview of OUSA Policy and OUSA Priorities

OUSA's policy priorities are decided on each year at the OUSA Strategic Conference in informal fashion, and then passed by the Steering Committee at its meeting that weekend. OUSA policy papers are passed at the plenary session of each OUSA General Assembly, expire after four years, and contain a number of principles, concerns and recommendations as well as supporting body text. Advocacy priorities are pulled from the recommendations of papers. Decisions about which advocacy priorities OUSA will proactively pursue are decided upon based on urgency and impact of the potential recommendations, as well as the current political environment.

ii) OUSA Policies

At this time, OUSA has 20 policies, listed below in order of publication, by row.

Table VI.1: List of OUSA Policy Papers

LGBTQ+ Students	Reforming Ontario's Financial Assistance System	Promoting Success through the Broader Learning Environment
Students with Disabilities	Student Employment	Rural & Northern Students
Sexual Violence Prevention & Response	Ancillary Fees	A Comprehensive Access Strategy
International Students and Education	Housing, Transit, & Community Development	Indigenous Students
Accountability	System Vision	Student Health and Wellness
Mature Students	Student Mobility and Credit Transfer	Tuition
Technology Enabled Learning	Teaching & Assessment	

iii) OUSA Priorities for the Last Five Years

OUSA chooses 5-6 priorities each year. The panel does not have the expertise to analyze whether this is a good number of goals for OUSA to pursue each year. VP Education Matthew Gerrits notes that lobby meetings usually cover 3-4 priorities, depending on the MPP's interest, and that some comment that there are a lot of asks.

2014	2015	2016	2017	2018
Work-Integrated Learning	Experiential Learning and Work-Integrated Learning	Work-Integrated Learning	Experiential Learning	Experiential Learning
Mental Health	Mental Health	Student Supports	Mental Health	Mental Health
Tax Credits and Student Financial Aid	Mobility & Credit Transfer	Sexual Violence Prevention and Response	Sexual Violence Prevention and Response	Sexual Violence Prevention and Response Data
Open Educational Resources	Tuition	Tuition	Tuition & Funding	Tuition
Student Union Fees & Autonomy	Funding Formula	Student Grant	Open Educational Resources	Student Financial Aid
Teaching & Learning	Student Union Autonomy	Data Reporting	Data Reporting	International Student Healthcare

The panel notes that there are several multi-year priorities, which matches up positively with OUSA's claims that it pursues long-run priorities, and seems to indicate a level of inter-year cohesion within OUSA.

Section VII: OUSA Advocacy Priorities Goal Achievement

i) Overview

This section explores the priorities laid out in Section VI, and assesses whether advocacy efforts on these items led to any outcomes. This section was supported by an OUSA activities report which summarized major achievements on these themes. OUSA provided achievements, and where possible VP Education Matt Gerrits attempted to find evidence of OUSA involvement or OUSA influence to backup OUSA's claims. Each victory claimed by OUSA should be taken as is, but note that supplemental information is, unless otherwise noted, independently found or verified by VP Education Gerrits Each advocacy goal is followed by a chart, which notes if there have been major policy movements on the file that was an OUSA priority, if the changes were close or identical to OUSA policy stances, whether OUSA advocated on those specific changes in advance of the changes, and whether OUSA received any form of public credit for being an advocacy group which pushed for the change. Checkmarks indicate that element was fulfilled, and x's indicate that the element was not fulfilled to the satisfaction of the committee.

ii) Experiential Learning

Experiential learning in OUSA papers is spread across multiple papers, with a significant amount residing in Broader Learning Environment, a policy paper from the institutional era. Recommendations include,

“Universities that have identified WIL as a strategic or differentiated priority should create opportunities for students in all disciplines to undertake a work-integrated learning experience during their undergraduate program” and,

“Where work-integrated learning has been identified as a strategic institutional priority, government and universities should work together with industry to provide meaningful opportunities for students that enhance their chosen field of study through the fulfillment of explicit learning outcomes”.

OUSA advocated on experiential learning in some capacity in each year from 2014. Outcomes OUSA claims as a result of its advocacy include OUSA's inclusion on the Premier's Highly Skilled Workforce Expert Panel and consultation on the Employment Standards Act, as well as 190 million dollars invested in the Career Kick-Start fund in 2017.

Major Movements?	In Line with Policy?*	OUSA Advocacy preceding?	OUSA Credited?***
✓	✓	✓	✓

*Broader Learning Environment calls for universal WIL in universities, which is what Career Ready and Kick-Start Funds are nominally meant to achieve

**Were selected as the only non-governmental quote in the press release for the funding

iii) Tuition and Operating Grant

OUSA's stances on tuition are laid out in a number of papers, including System Vision, but it is laid out most prominently in its Tuition Paper. OUSA consistently calls for tuition and ancillary fees collectively to make up approximately 30-40% of the total university system's operating budget. OUSA ran a campaign on tuition asking for a tuition freeze in 2015.

While OUSA has been included in consultations on the tuition framework in the previous Liberal government headed by Kathleen Wynne, the only other achievement related to tuition rates was the PC government decision to cut tuition, a farther reaching policy action than OUSA was calling for, that also simultaneously caused serious cuts to OSAP. To date, no OUSA advocacy has led to the increase of university operating grants in Ontario, with operating grants staying roughly steady or slightly decreasing in real dollars.

Major Movements?	In Line with Policy?*	OUSA Advocacy preceding?	OUSA Credited?
✓	X	✓	X

*Achieved tuition cuts, but without corresponding increase in operating grant

iv) Mental Health

OUSA maintains a comprehensive wellness paper which includes a significant number of recommendations across a number of different practices, but essentially called for increased support to both on and off campus mental health supports and healthcare for students. OUSA also had a leading hand in publishing two collective publications on mental health, both *In It Together* and *Shared Perspectives*. OUSA lobbied on mental health or student supports in every year from 2014-2018.

In the election, the three largest parties in Ontario all called for increased funding for mental health care, and the elected PC government committed to 2 billion dollars over 10 years. OUSA has since been lobbying on how that funding should be allocated.

Victories claimed by OUSA include an investment in the Mental Health Innovations Fund in 2014 where OUSA was the primary contact on the CMHA website for the government program, as well as \$73 million in adult psychotherapy in 2017 and a 6 million dollar expansion in campus mental health resources also in 2017, the latter of which was called for in OUSA's budget submission that year at the rate of 12 million dollars.

Major Movements?*	In Line with Policy?	OUSA Advocacy preceding?	OUSA Credited?***
✓	✓	✓	X

*Made it into all major party platforms

***In It Together* was mentioned by Premier Wynne while campaigning on mental health, but not in any announcements

v) Sexual Violence Prevention and Response

OUSA maintains a standalone policy on sexual violence prevention and response. It has a number of recommendations, including mandating training for staff, faculty, and bar staff, collection of data including a climate survey, and university policy mandates among others. OUSA lobbied on its sexual violence recommendations from 2016-2018.

OUSA has seen a number of engagements on this topic since 2016, with the development of the legislative mandate for standalone sexual violence policies in Ontario in 2017, a private member's bill in 2017 introduced on a recommendation on SmartServe training, and the institution of a provincewide survey on sexual violence in 2018 which also included OUSA consultation among others to design.

	Major Movements?	In Line with Policy?	OUSA Advocacy preceding?	OUSA Credited?*
SmartServe	Minor	✓	✓	✓
Climate Survey	✓	✓	✓	✓**

*OUSA was mentioned in the NDP's release on the bill for SmartServe

**OUSA was mentioned as involved with the actual design of the survey, after explicitly asking for it

vi) Student Financial Aid

OUSA has lobbied on financial aid, primarily on the Ontario Student Assistance Program in 2014 and 2016-2018, which saw the wide 2017 implementation of many elements of OUSA's student financial aid reform policy, including changes to over-awards, definition of full-time student, increases to the student grant, consolidation of programs into a new Ontario Student Grant, targeted free tuition, changes to income limits on repayment, RESP exemption from assets, and others. Some of these policies were subsequently rolled back, but many remained. For a period of approximately two years, these changes led to combined increased spending of approximately 1.4 billion dollars in the post-secondary education sector, targeted to students most in financial need. Some additional victories

were seen before the OSAP transformation of 2017, including the expansion of OSAP to fifth year students, and changes to expand debt rehabilitation.

Major Movements?	In Line with Policy?	OUSA Advocacy preceding?	OUSA Credited?*
✓	✓	✓	✓

*Credited in Question Period by the Deputy Premier on 29 November 2017

vii) Technology Enabled Learning and Open Educational Resources

OUSA lobbied on this topic in 2014, 2017, and 2018. The province established eCampusOntario in 2015. Former Premier Wynne and Deputy Premier Matthews were both strong supporters of online learning. This has not been as large of a theme in budget submissions of OUSA, found only in the 2018 budget submission asking for scaling, though it should be noted OUSA has advocated for open educational resources before the timescale of this section. In OUSA's time advocating for Open Educational Resources and Technology Enabled Learning, Ontario saw the creation of eCampusOntario, the Open Textbook Library, and a 1 million dollar investment in the OPen Textbook Library.

Major Movements?	In Line with Policy?*	OUSA Advocacy preceding?	OUSA Credited?
✓	✓	✓	✓

*OUSA's online learning policy did call for increased funding

**OUSA was credited in Question Period by the Deputy Premier on 29 November 2017

viii) Data

OUSA's calls for data accessibility and quality are spread throughout all of its policy papers, and was a formal priority in 2016 and 2017. OUSA furthered the conversation around data as a mechanism for accountability. Data quality was championed by Liberal MPP Yvan Baker, including the introduction of a private member's bill on OUSA's priorities vis-a-vis HEQCO (Higher Education Quality Council of Ontario). Data reporting was also included in the Minister's mandate letter for MAESD.

Major Movements?	In Line with Policy?	OUSA Advocacy preceding?*	OUSA Credited?
Minor	✓	X	X

*Without documentation this is designated an x however, it is the understanding of VP Education Gerrits does recall that much of Yvan Baker's inspiration came from OUSA

ix) Mobility and Credit Transfer

Was a priority in 2015, including inclusion in the 2015 budget submission. The priorities are pulled from OUSA's Mobility & Credit Transfer policy paper. Post-OUSA advocacy, ONCAT (Ontario Council on Articulation and Transfer) received additional funding, and OUSA remains a strong partner of ONCAT. ONCAT continued to be mentioned in the most recent public mandate letter for MAESD.

Major Movements?*	In Line with Policy?*	OUSA Advocacy preceding?	OUSA Credited?
✓	✓	✓	X

* Expansion of ONCAT was a major movement, but OUSA only indirectly asked for additional funding

** Did not directly reference ONCAT in budget submission, as increased government funding to ONCAT was not in the policy. INstead referenced outcomes that were in policy

x) Student Union Autonomy

Student union autonomy is encapsulated in the OUSA ancillary fees paper, though what previous papers it was included in was not covered by the scope of this investigation. OUSA admits that OUSA's advocacy efforts on autonomy bore little fruit.

Major Movements?	In Line with Policy?	OUSA Advocacy preceding?	OUSA Credited?
X	X	X	X

xi) International Healthcare

This is drawn from OUSA's Student Wellness paper, advocating for an international student buy-in to OHIP, which would address a billing premium that can be charged by healthcare providers to non-OHIP healthcare recipients. This was advocated on in November 2018, and may continue to be a priority into the future.

Major Movements?	In Line with Policy?	OUSA Advocacy preceding?	OUSA Credited?
X	X	X	X

xii) Conclusion

Government action has significantly overlapped with OUSA priorities, in 7/11 of the above priority areas being addressed in a major way by the government. Of those 7, 6 of the major changes noted did follow OUSA policy, with the tuition cut not being in the mold of OUSA policy. Of these 6 major policy moves in the last five years, OUSA was explicitly mentioned by the government in some fashion in five of them, averaging one major policy achievement from OUSA's priorities list per year over the last five years.

It should be noted that this is not the full extent of OUSA achievements, but is solely a cursory investigation of OUSA's achievements on its own policy priorities over the last five years.

Section VIII: Tangibility of OUSA Recommendations

i) Organization Recommendations

OUSA's policy papers are organized with policy papers being placed in recommendations sections of their policy papers. To assess that the recommendations are tangible, and within the policy realm, the Panel has reviewed both the process and the results of the policy process, and finds that a majority of the recommendations are tangible. The logical test for tangibility can be found in Appendix B, but it considers policy implemented elsewhere, policy that has low to zero cost, policy that prioritizes asks for additional study or information, policy that is being advocated for by external organizations, whether a policy is innovative or not, and whether it is within scale or previous OUSA or student association achievements with the provincial government. The VP Education conducted this analysis on each of OUSA's 650 recommendations in its policy library at time of analysis. Appendix B contains a summary of the analysis of OUSA's policy library. The full analysis will be available for inspection via the Federation Research and Policy Officer, as its size is not conducive to inclusion in this report.

ii) Process

OUSA's policy process is initiated by selection of a policy shortlist by the Steering Committee, and selection at a General Assembly. Research is compiled for presentation in a research pack, and papers are written by student authors. Papers are then presented to the General Assembly for edits and approval.

Upon review, the Panel finds that there are multiple points at which less tangible policy recommendations may enter into the process:

1. *Indirect entry via research packs-* Research and Policy Analysts are given some liberty to pursue relevant research and collate it into research packs. With each pack worked on by only one analyst, this could provide the opportunity for conscious or unconscious selection of research that may contribute to less tangible policy.
2. *By the authors-* Authors are ultimately responsible for the first drafts of the principles, concerns, recommendations and body text of each policy paper. While they are given research packs, they are free to use the research to craft these elements howsoever they choose.
3. *By the assembly-* The ultimate final responsibility for contents of principles, concerns and recommendations lies with the votes of the OUSA General Assembly. Any delegate may suggest changes or concerns at the

breakout stage. Any delegate may move, and the assembly may accept, changes of any form to the policy papers at the plenary stage.

Upon review, the Panel identifies the following mechanisms for correction of unrealistic policy recommendations:

1. By judgement of the researchers and executive director- Research and Policy Analysts are expected to be critical regarding research packs. When asked about which safeguards are in place to avoid selectivity in course pack creation, the Executive Director of OUSA stated that supervision of the creation of the course packs on the part of the director is considered a core part of their duties as a supervisor. When first drafts of policy are sent back to the analysts, this also provides an opportunity for analysts to ask authors to reconsider any less tangible elements within the policy or items not backed up by research.

2. By judgement of the authors and editors- Judgement of the authors is important in policy creation. Authors are generally employees in the advocacy area of student associations, and can often be more attuned to the political realities of the day. Authors play an important role in checking introduction of less tangible recommendations by analysts, other authors or the assembly. During the think tank process, authors will collectively set out the general feel for the paper, and iron out early disagreements as best as possible as an authorship team. This stage allows a chart to be pathed that diverges from analyst recommendations, and also allows the authorship team to challenge each other if they are bringing less tangible recommendations to the table. During the writing process, the authors are free to peruse the documents behind the research pack, as well as attempt to find or conduct other research of their own, further allowing critical engagement with analyst findings. After the drafts are submitted and revised, they are sent to another non-team OUSA steering committee member for a pass-through of recommendations as well as understandability. At the General Assembly, authors are able to provide pushback to feedback they receive by choosing not to implement breakout suggestions with justifications or without in the case of unpopular feedback. SC congregates and consultation with SC to come to a firm and well-reasoned decision on tangibility also happens, potentially allowing for firm direction to be given during plenary voting on a united front from steering committee.

3. By the General Assembly

At the General Assembly, delegates of the members have the authority to approve or disapprove unrealistic policy recommendations, if it so chooses. While this does not provide any guarantee of realistic policy, it is a precondition of a deliberative body making final decisions on policy.

In summary, the Panel finds that the process surrounding policy development gives multiple points of entry for unrealistic sections. No process may guarantee full tangibility in an alliance with disparate ideas of what tangible means, nor can it always avoid popular opinions from becoming policy via the democratic process plenary. However, the safeguards in place are indicative of a healthy system of critical thought surrounding tangibility.

iii) Policy Recommendations

The panel has reviewed OUSA policies, and has found that 61% of recommendations could be considered tangible and achievable policy goals. The Panel finds that the size of the OUSA policy library means that many of the policy asks will not reach completion, and the totality of financial asks within all recommendations represents an unlikely investment in the current political environment. However, the nature of most recommendations are within the realm of policy ideas that would be considered reasonable from a practical stakeholder advocacy organization.

The Panel also recognizes that it is not well equipped to adjudicate the tangibility or likely political reception of many of the recommendations in OUSA papers. The Panel has however highlighted some recommendations which may represent a less realistic or practical approach to advocacy:

Some of the above recommendations represent OUSA taking principled stances, which the Panel recognizes may serve a purpose in taking a strong stance to signal principles, but nevertheless, are not smiled upon in Council procedure. The panel has not chosen to make an exception for these, but assessed each recommendation according to its tangibility, which we assessed holistically via the following principles.

iv) Process Remarks

The now expired policy 20 of the Federation of Students uses the wording of “tangibility”. Upon discussions the panel finds this language difficult to analyze, and finds that there may be reason to revisit if this is language most accurately encapsulates the goal of ensuring practical and collaborative advocacy. In many circumstances, OUSA recommendations sometimes resemble principled and unlikely to be achieved policy stances. The Panel recommends that to best address ensuring a practical and high-performing provincial advocacy organization, that a metric for future assessment be based on: Recommendations that where possible are pragmatic and politically feasible and reasonable, based on whether they meet one or multiple of the following conditions: have been adopted in other jurisdictions, are advocated for by groups without significant personal gain, are backed by reputable research, are reasonably incremental changes to existing programs, use typical policy tools, or simply ask for data, coordination, frameworks, or committees. Special consideration should be granted to

recommendations that are innovative or timely in nature, or those that are so narrowly constrained to student experience that it makes no sense for any organization other than a student organization to pursue them. In these special consideration cases, special care should be given to ensuring that the government tools requested are feasible, and that there is evidence that backs up that recommendations will solve the concerns they purport to address.

v) Conclusion

The Panel finds that with 61% of policies being considered tangible by a panel-derived standard, that OUSA policy focuses largely on achievable and politically salient asks. There is room for improvement, and the panel is communicating its conception of how “tangibility” ought to be considered in creating policy going forward. The panel hopes to see this number increase, but recognizes that conceptualizing “tangibility” is an imprecise task for both policy writers and delegates as well as for the panel and its successors.

Section IX: Post-Secondary Focus

i) Policy Process

At an overarching level, OUSA has good tools to maintain a post-secondary focus. The shortlisting process of policy ensures that the broad topic areas of policy are originated by the Steering Committee, which tends to have a good understanding of the post-secondary focused philosophy of OUSA. The policy process gives opportunities for policy not relating to post-secondary education to enter the final policy papers. There are two primary areas in where non-post-secondary policies can enter into the discussion.

1. *Authors*- Authors could introduce non-secondary focus areas based on use of analyst research, or their own research. Student authors tend to want to create policy that will effectively solve a problem, and often the most apparent tools are those that may stray from a post-secondary focus, especially universal programs that greatly affect students, or primary and secondary education as the avenue to appropriately prepare students for success in post-secondary.

2. *General Assembly*

Generally, safeguards at the General Assembly level are not robust. However, changes at the General Assembly tend to remain within the scope of the sections written by the authors. If authors, through their own adherence to a provincially and post-secondary focused approach, along with the guidance of analysts, an authorship and editing team, the actual categories of topic going to General Assembly can effectively dissuade most non-PSE policy.

ii) Policy Recommendations

The Panel deliberated on the nature of recommendations in the OUSA policy papers.

Multiple issues that reached beyond the post-secondary education.

Quantitatively, approximately 9% of OUSA recommendations fall out of the sole PSE scope. Many of these recommendations dealt with the transitions into and out of post-secondary education, but there are other policy recommendations which while motivated by post-secondary policy, do go beyond targeting post-secondary students. The examples seemed distributed among various papers, and generally fall into broad categories.

1. *Primary and Secondary Education System*- This category encompasses OUSA recommendations that make recommendations for the primary and or secondary school systems which do not fall into the transition process from secondary to post-secondary education. Examples would include changes to primary curricula, for example.

2. *Universal Policy that include post-secondary students/Community Resources for Students*- This includes recommendations which suggest sweeping changes that would greatly benefit students but would also have

significant impacts outside the student community, such as recommending that SmartServe have mandatory sexual violence prevention training.

Recommendation: OUSA should review the authorship process of policy papers to include measures during the editing process to identify and eliminate to prevent policy recommendations from falling out of scope of the post-secondary sector.

iii. Conclusion

The panel finds that with 91% of policy falling within the scope described, that OUSA is meeting Feds expectations as an external political organization with respect to post-secondary focus.

Section X: Assessment on Feds Autonomy

i) Obligations in OUSA By-law

The responsibilities of the members are outlined in the OUSA by-law:

1. support the objective of OUSA and abide by the provisions of this By -law;
2. represent the interests and concerns of its member students at meetings of OUSA;
3. communicate information from OUSA to its student government and the students which the Member Association represents;
4. allow representatives of OUSA access to the deliberations of its assembly, council or board in all matters pertaining to OUSA;
5. allow representatives of OUSA to promote the organization on its campus for the purposes of outreach and awareness, referenda concerning OUSA, and promotion of the projects and campaigns of OUSA, provided that OUSA shall provide reasonable notice of its intention to attend at a Member Association campus; and
6. strive to support the work of OUSA by making available the resources of the Member Association for the projects and campaigns of OUSA, including, without limitation, sharing research and data with OUSA and the other Member Associations in order to facilitate the generation of policy positions.

These responsibilities raise some concerns with the committee. Obligation four seemingly includes deliberations in confidence, for matters regarding a vote to leave OUSA that may suffer from the presence of OUSA representatives, nor for the budgeting process, or any privileged discussion in confidential session that pertains to OUSA, which are problematic. Obligation six is additionally problematic, regarding the use of the words “without limitation”, and seeming to obligate participation in campaigns. Furthermore the section does not address when a member may wish to keep some data confidential, including sensitive student data. Finally, the obligations do not outline the details regarding additional financial support for the purposes of participating in events, nor the provisioning of a well-resourced and qualified steering committee member.

ii) OUSA Campaigns

Generally there is an expectation that the member associations will dedicate time on social media and use human resources to promote OUSA campaigns to make campaigns effective. In the case that an

association chooses not to substantially run a campaign, it is free to do so, such as Feds choosing not to substantially run #textbookbroke this year.

iii) Policy Disagreements

At times, due to being part of a diverse coalition, OUSA policy may include recommendations not in line with the policy of a member association. In the case that there is a policy disagreement between OUSA and a member association, and if it were to be a part of advocacy priorities, OUSA's philosophy is that an SC member would be introduced as representing OUSA rather than their member organization, and pass off questions to other members of a student advocacy week team. In the case that an SC member is asked to comment on OUSA policy, they are able to pass off a question to the OUSA president if it disagrees with a member association policy.

iv) Membership

OUSA's membership process remains highly respectful of Feds autonomy. The membership agreement of OUSA with the Federation of Students permits immediate withdrawal if necessary. The more normal membership departure process does have a latency of 90 days, and ongoing financial obligations for the remainder of the fiscal year among withdrawal. These processes satisfy the conditions laid out in Feds bylaws regarding ability to leave EPOs.

Recommendation: Current practices surrounding policy disagreements of a steering committee member and speaking on behalf of OUSA or their member association should be placed in procedure.

Recommendation: That OUSA Steering Committee should revisit the obligations of OUSA members to ensure that the language accurately reflects current practice and ensures autonomy for OUSA members, and protection of deliberations in confidential session.

v) Conclusion

The status of autonomy of Feds remains relatively strong within OUSA. Current practices are wholly satisfactory, however, the panel finds that some changes to OUSA By-law obligations may strengthen the formal powers and arrangements surrounding autonomy of the Federation of Students. The panel sees this requirement as being met.

Section XI: Student Driven Leadership

Student driven leadership is not discussed in depth in Feds documents, and so the panel explored student leadership in various elements of leadership, management, policy and other elements of OUSA operations.

- i) **Student Participation in Organizational Direction**
 - i. **Steering Committee-** The Federation of Students VP Education sits on the OUSA Steering Committee each year, giving Feds a great deal of presence in setting strategic direction, setting procedure, having influence on HR, etc. The Steering Committee is comprised wholly of students involved in student government, with the executive director sitting as a resource member.
 - ii. **Strategic Planning-** Consultations are held in connection with the Long Range Plan on important issues that may require more broad input than a Steering Committee alone could provide.
 - iii. **Upper management-** The Executive Director is regularly overseen by the OUSA President, a student, with, on average, weekly check-ins and reviews of performance and operations.

- ii) **Student Participation in Advocacy Priority Setting**
 - i. **VP Education-** The Vice President Education sits on the OUSA Steering Committee, which determines advocacy priorities on an annual basis.

- iii) **Student Participation in Policy Approval**
 - i. **Authorship-** OUSA policies are written by student authors, and modally, the VP Education will write two policy papers, with a commissioner or other Feds associated person also writing sections each time.
 - ii. **Delegation-** OUSA delegations are made up of students, including Feds holding approximately 20% of delegates currently. Delegates have the opportunity to review and discuss the policy before GA.

- iv) **Student Participation in Financial Decisions**
 - i. **Financials-** The Executive director does the majority of day-to day financial management. The Executive Director is hired and overseen by students.

- ii. Budgeting- The budgeting process is initiated as a collaboration between the OUSA Executive Director and VP Finance, who look at previous actuals and income to determine baseline incremental spending for the next year. The VP Finance then works with the Executive Director to identify strategic spending for the year. Finally, the steering committee as a whole is given the opportunity to view the budget, make any changes, and allocate any unused projected surplus towards strategic initiatives. Summaries of spending by activity area are delivered to General Assembly.
- iii. Audits- Auditors reports are received by delegates of the membership at the OUSA General meeting.

Recommendation: That OUSA Steering Committee members are introduced to the strategic, human resource and policy roles they play, as well as corresponding duties in OUSA's governing documents no later than Strategy Conference.

Recommendation: The OUSA Steering Committee should also receive a presentation by the outgoing president delineating their roles and duties as a representative of their member associations, and as a fiduciary of OUSA, and to what degree their actions can be reflective of their representative nature.

v) Conclusions

The state of student driven leadership in OUSA's operation is strong, and cuts across strategic, financial, policy, and human resources elements of OUSA's operations. OUSA's focus on postsecondary student leadership, including having a member association representative holding the president role within the corporate structure, as well as having 100% of voting power for general assemblies and on the board of directors held by either students or elected student leaders, leaves the panel highly satisfied that the expectation that Feds has communicated is being met.

Section XII: Financial Status and Management

i) Is spending within the organization accountable?

1. *Expense Guidelines and Policy*

OUSA's expense guidelines generally seem reasonable and accountable. The guidelines stipulate that employees must make every effort to incur expenses at the most economical rate. Allowances for mileage reimbursement when on official business and meal per diems are both within the range deemed reasonable by the Canadian Revenue Agency.

2. *System Descriptions*

Current financial controls that are in place seem reasonable and sound to ensure that all spending is accounted for and mitigate the potential for fraudulent activity to take place.

However, one area of concern was flagged and is recommended to be revised the following purchasing procedure should be revised:

Recommendation: "Large purchases are given oral approval by President or VP Finance."

It is recommended that the second bullet under the Purchases/Expenses section be changed to read 'written approval' instead of 'oral approval'. The reason for this change being the foreseeable confusion and potential miscommunication that can arise because of purely oral confirmation. Written approval is recordable and traceable which makes it a more reliable method of communication. It is recommended that 'large' be quantitatively defined so as to also avoid confusion.

ii) Is the organization solvent and reasonably expected to continue being solvent?

The 2018 audited financial statements indicate that the organization has \$415,922 of member's equity. When compared to liabilities of just \$28,385, the organization has a very strong debt-to-equity ratio of 0.07.

Included in their assets are \$293,952 of short-term investments which indicates a healthy position of financial savings.

One area of note, the organization's tangible capital assets are nearing the end of their useful life and therefore will need to be replaced soon with accumulated amortization having reached 90% of their original cost.

In conclusion, based on the financial information provided, the organization is in a good financial position and is reasonably expected to remain solvent in the future.

iii) Are financial decisions made primarily by students?

Final approval of the annual budget comes from Steering Committee, which is comprised entirely of students. The development of the budget is done by the Executive Director along with the Steering Committee. A majority of costs are fixed year to year (such as staff salaries/benefits, lease cost, office supplies), meaning students have little discretion over these expenses. However, other areas of the budget are more flexible year to year based on the advocacy priorities set by the Steering Committee.

iv) Does the organization provide regular financial reporting to its' membership?

Beyond the legal requirement of the audited financial statements being received at the annual general meeting, no financial reporting is given to membership.

Recommendation: For the purposes of financial transparency, executive accountability, and organizational stability, OUSA should begin to provide regular and high level financial reporting on a semi-annual basis to its' membership (to be disseminated to the members' students). This is important because students should have the right to see what their dollars are being spent on.

v) Are audited financial statements made available to the public?

Audited financial statements dating back to fiscal year ended April 30, 2008 are publicly available on the OUSA website.

One area of concern is the use of the same auditor every year for as far back as the annual audited financial statements were made available to us (Fiscal Year Ended April 30, 2008). Industry best practises say that an auditor should be rotated every 5-10 years so they maintain their role as an independent, external review of an organization's finances. Additionally, when asked for his professional opinion on the matter of auditor rotation at the 2018 AGM, the current auditor stated that it would be a good idea to rotate auditors every 7 years.

Therefore, it is recommended that OUSA develop operating policies governing the selection of auditors which includes an auditor rotation provision that will be no longer than a period of 10 years.

vi) Endnote

This financial analysis was completed before the announcement of the Student Choice Initiative by the Ontario Government. While details on implementation of this are still being fleshed out, it is presumed the OUSA fee will be able to be opted out of by students. This will pose a significant financial risk to OUSA as their revenue stream will no longer be guaranteed. In order to maintain financial viability, OUSA will have to re-examine their budget with an eye towards cutting unnecessary expenses. It is also recommended that OUSA work on better demonstrating their value to students so they are more likely to support the organization financially.

Section XIII: OUSA Member Engagement with Feds

i) Overview of Engagement Types

OUSA's engagement has been identified by the VP Education for the panel, with opportunity for input by OUSA's ED, as falling into these categories:

1. *Engagement with Steering Committee Members*

The most frequent point of contact for member engagement, where the Steering Committee member (Vice President, Education) is able to serve as a conduit between the operation and direction of OUSA, and Feds.

2. *Engagement with Delegates*

Waterloo sends 10 delegates, not including the VPEd, to each General Assembly. At this time, delegates are typically drawn from a combination of Feds Executive, VPEd portfolio commissioners, other members of Feds governing bodies such as student councillors, and students at-large. Delegates have an opportunity to learn about OUSA, as well as participate in the policy process at both breakout sessions and at plenary.

3. *Engagement with Member Associations' Governance*

OUSA conducts campus visits at least once a year, where one of the goals of the visit is to engage with member association governing bodies.

4. *Engagement with Feds Staff*

OUSA engages with Feds advocacy staff, including collaboration on research projects and campaigns.

5. *Engagement with demographic student groups*

OUSA maintains a significant number of papers that focus on marginalized student groups. Engagement with these groups is important to ensure that papers reflect the actual problems faced by these groups, and treat these groups with dignity.

6. Engagement with students at large

a. Campaign Engagement- Students often engage with OUSA via campaigns, which move toward motivating action, as well as being a main vehicle for OUSA awareness.

b. Other Participatory Engagement- OUSA provides other opportunities

for students to get involved such as through writing opportunities.

c. General Awareness- OUSA works with Feds to promote some general awareness of OUSA's brand.

Engagement generally refers to interactions between these groups and OUSA, and whether the activities are conducive to building a relationship appropriate for the given group. A working group of the panel constructed survey questions to former VPs Education, members of Feds Council and Board, and former OUSA GA delegates to ask about their experiences with OUSA in their particular group context, and to try to identify themes from their responses.

ii) Overview of Evaluation Criteria

For each type of engagement, the panel has deliberated on effectiveness by three interlocking categories, and has rated each on a scale of 1-4. The three categories in which each type of engagement will be evaluated are quantity, quality, and efficiency.

1. Quantity

This category assesses the amount of engagement touchpoints experienced in this category, and whether the amount of touchpoints are adequate considering the current fashion in which engagement is conducted.

2. Quality.

This category assesses whether the format and nature of the engagement are adequate to serve the engagement needs of the target audience.

3. Efficiency

This category assesses whether the nature of the engagement currently is done cost-effectively, with effective timing, and is appropriately tuned to the Feds specific context.

Each type of engagement is rated on a scale of 1-4 as described below. It is important to recognize that the measurements are not evaluated relative to each other. Each of these rankings are applied subjectively in each category by the panel in light of evidence in each category, and are not cross-comparable. It is noteworthy that the Federation of Students lacks any particular expectations for engagement, and so the panel has been given the opportunity to provide their own judgements of what does and does not constitute the benchmark for appropriate engagement. Significant disagreement among members of the panel with regard to rankings or findings has been noted.

1	Unacceptable	This ranking indicates cause for grave concern with the
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		status of performance on engagement, requiring clear commitments for significant improvement from OUSA.
2	Requires Improvement	This ranking indicates that performance on engagement is below what can be expected of an organization in which Feds hold membership.
3	Adequate	This ranking indicates satisfaction with the level of service provided by OUSA.
4	Exceeds Expectations	This ranking indicates that OUSA significantly exceeds expectations of engagement in this category.

iii) Evaluation, Findings, Recommendations

1. Engagement with Steering Committee Member

Quantity	Quality	Efficiency
4	3	3

Findings:

OUSA has a focus on engaging its steering committee members, with in person meetings on a monthly basis with the professional development, and other tasks. OUSA procured the services of two steering committee alumni who now offer success coaching through their own consulting firm, and created a series of workshops spread throughout the first seven months of the governing year, including sessions on workplace management, effective collaboration at OUSA, some typical roles and best practices of SC members on home campuses, goal-setting, time-effectiveness, and review of previously set goals to help identify roadblocks in achieving them. Additionally, online contact is available and utilized via Slack as a workplace communication tool on a more frequent than weekly basis, to be able to consult home office staff on the VPEd's questions on policy, research resources, logistical details, or for historical context or advice. Slack is also used to facilitate HO staff to the reach out to the VPEd and provide reminders on deadlines or conduct other check-ins.

The quality of engagement has increased in recent years, with an increased focus on decentralizing some functions by the President to other SC members, such as delivering talks and attending conferences. Additionally, OUSA has obtained pro-bono consultants on effective workplace effectiveness who were formerly involved with OUSA. The format of

the development has been well received by the current VPEd, who has used some of the lessons in work, frequently accesses the expertise of OUSA staff to improve his performance on provincial policy

The efficiency of engagement has also increased, with concerted pairing of professional development or other events with SC meetings to reduce duplication of travel required for the VPEd. While the engagement continues to comprise a large portion of the VPEd's time, OUSA has taken clear steps to ensure that events are organized as concisely as possible. Some events still remain with fewer programming hours. Some investigation by outgoing steering committees over the next years may prove to better highlight which events can be folded into others, or may need more drastic changes.

The past 4 VPs Education were asked questions about engagement with OUSA. Three provided answers, in addition to commentary above drawn from the experience of the current VP Education. All respondents stated that OUSA gave them a more positive impression through their engagement with it than before they were involved in their capacity as VPs, and both indicated that they felt their time at OUSA improved their advocacy within Feds. Two indicated that OUSA was not proactive in supporting their role within Feds, and one noted that OUSA was proactive. They both indicated that OUSA staff were receptive to suggestions from the VPs Education with regard to improving OUSA direction and operations.

Recommendations:

OUSA should conduct exit interviews with SC members to better evaluate its annual cycle of events.

2. *Engagement with OUSA GA Delegates*

Quantity	Quality	Efficiency
3	3	3

Findings:

A survey was sent to GA delegates from the last 3 years of general assemblies. Seven delegates provided responses. Five stated that their experience at OUSA GAs improved their opinion of OUSA, 1 said it detracted from their opinion, and one gave a numerically neutral but qualitatively negative response. All seven expressed that OUSA gave them

opportunities for personal and professional growth, and all three delegates who attended multiple GAs shared that these opportunities for growth were continued beyond their first GA. When asked about whether OUSA GAs had them feel that it let their voice be heard in the policy process, 3 of seven said it did, and 4 stated they did not feel heard, with two delegates providing that they felt the policy process was too author driven. One of the four stated that it felt like returning delegates were able to participate. Also noteworthy was that delegates shared that in general they had very little knowledge of the organization coming into their first GA.

A former VP Education in response to the OUSA engagement survey noted that delegates are often over-confident in their understanding of both the function of OUSA not as a government but as an advocacy organization.

Recommendations:

OUSA should develop summary documentation of the roles of delegates during General Assemblies.

OUSA should maintain internal documentation accompanying each policy, including notes from breakout sessions and plenary, to help authors writing future papers to understand heterodox or outside views when formulating the next iteration of the policy, to ensure that dissenting voices are not forgotten in an organization with high turnover.

3. Engagement with Governing Bodies

Quantity	Quality	Efficiency
2	2	3

Findings:

In conducting surveys with some members of Feds Council and Board who attended the most recent OUSA presentation, the panel found:

OUSA has not been solicited for, nor created materials for presentation at General Meetings

In addition, the Panel notes that there has been little consistency in presentations in the past, nor significant feedback given from Feds to OUSA on presentation. The panel encourages OUSA to work with the VPEd and Feds to create a common expectation as to how OUSA can engage with Feds governing bodies going forward.

A survey was sent to those members who attended a meeting hosted by the OUSA President, and three responded. All three responses stated that

respondents felt they were adequately informed about OUSA from the presentation, with some feeling from one respondent that there could have been more details on finances and connection of lobby work to successes as well as on governance and membership accountability. Two respondents felt that the VP Education was doing a good job informing Council of things happening at OUSA, and one stated that not much had been delivered in that respect.

With respect to desired format for future presentations and information, there was little agreement between the three respondents, with one stating they liked the format, one stating they'd prefer written communication, and one commenting mostly on VPEd communication.

In general, there seems to be no shared metric between Feds or OUSA as to what constitutes a successful presentation, and this is a pitfall that could be further investigated in the future.

Recommendations:

OUSA should work with the Feds VPEd to develop a common expectation of engagement with governing bodies.

OUSA should work to prepare materials for inclusion by the VPED in select Council reports, with a suggestion that such materials be delivered at least once per term

4. Engagement with Feds Staff

Quantity	Quality	Efficiency
2	3	3

Findings:

In conducting discussions with the Marketing Specialist for advocacy, the Panel found that more effort could be exerted to vet marketing materials. While this is not a significant concern, it is an opportunity to leverage decentralized resources in each student association.

OUSA provides a Best Practice Sharing Day, which is an opportunity for Executive and commissioner level staff to participate in. Commissioners were not able to attend this year due to co-op or classes. This does not seem to be an obstacle for other OUSA schools such as McMaster or Western, and the panel does not have any recommendation to OUSA for increasing availability to commissioners. Upon interviewing Feds VP, Student Life, some remarks on Best Practice Sharing Day were that it would be more useful to have more schools of Waterloo's size, even if not OUSA schools, because operations are generally predicated on school size.

OUSA's support and best practice sharing among *Stakeholder Relations Manager* and *Research and Policy Officer* equivalents is lacking, and could benefit from exploration of opportunities for facilitating more pooled research reports of institutional issues and best practice sharing opportunities. Some evidence of potential collaborations can be seen in *Hungry for Knowledge* collaboration with Meal Exchange, to collect comparable data across participating OUSA schools on food security on campus.

OUSA also provides opportunities to commissioner level staff to help write OUSA policy papers with training offered at Training Day, which happens in September. However, additional resources could be placed into permanent anytime-access documents such as a style guide, backgrounders, or documents to assist SC members in training commissioner staff..

Recommendations: OUSA should give more opportunity to involve our Marketing Specialist- Advocacy in the vetting of OUSA promotional material.

OUSA should provide resources for best practice sharing among research and stakeholder relations roles.

OUSA should facilitate and provide research advice on joint reports on institutional issues between researchers on various member campuses.

5. Engagement with Demographic Student Groups*

Quantity	Quality	Efficiency
2	3	3

*With no persons to interview about the process, quality and efficiency were interpreted by the VP Education based on understanding of process as pursued during the Indigenous Students' Paper as well as on other campuses.

Findings:

OUSA publishes a variety of policy papers that deal with marginalized groups, such as mature students, Indigenous students, Students with disabilities and others.

OUSA's standard approach for evidence based policy is to gather secondary research already in existence as well as conduct supplementary primary research by conducting interviews with these groups. This engagement tends to equal reaching out to individuals these communities for approximately one month every four years. This

represents efficiency, however the amount of engagement is sub-par for these OUSA stakeholders.

OUSA also encourages SC members to build connections with these groups to help ensure that they are aware of OUSA, and so that these connections can be leveraged for effective and diverse primary research when these policy papers are written. To that end the Panel finds that Feds has not done enough in recent years to blame OUSA for lack of engagement. However, the panel recommends that OUSA does more to enable SC members to connect with leaders within these communities, including creation of a small package of materials for SC members to give to some key student groups explaining OUSA in the context of their demographic or identity.

In an interview with GLOW coordinator they relayed that they were largely unaware of any consultations for the upcoming LGBTQ+ paper and expressed concern that they were not consulted. Recently, OUSA addressed this topic at their General Assembly, and connection of researchers with marginalized communities is the responsibility of an OUSA Steering Committee member, so this is a cause for some, but not critical concern, for OUSA as an organization as a whole.

Recommendations:

That small, identity specific information packages for paper-specific identity groups be created for distribution by SC members annually.

OUSA should keep files accompanying more equity focused paper, that can be updated at any time with concerns or problems identified by members at member associations, so that all of these topics are highlighted before interviews even begin for the authorship process.

6a. *Engagement with Students At-Large, General Awareness**

Quantity	Quality	Efficiency
2	2	2

*The Panel leaves it to the Education Advisory Council to determine how much General Awareness is needed for OUSA to be effective, and at what cost in terms of time and resources should be spent to improve general engagement.

Findings:

There is a perception that the current awareness of the average student to OUSA is minimal. This contrasts with schools such as Western and McMaster where the brand is more well known. Feds is not alone in OUSA membership for having poor awareness however, and the Panel finds some reasons for this.

Firstly, awareness of OUSA has generally been relegated to a decentralized responsibility, with each SC member responsible for providing awareness. In an environment where multiple issues are vying for student attention and there is an effort to grow a Feds Advocacy brand, Feds has put very few resources into OUSA promotion.

An assumption on the part of OUSA generally is that students have differing mentalities on each campus, and thus crafting messaging that would be well designed to improve awareness on all campuses would be difficult. Additionally, with recognition of limited airtime, OUSA chooses to focus marketing on specific policy issues such as experiential learning or OERs, rather than general awareness. At this time, the largest amount of general awareness is achieved through distribution of paraphernalia such as #textbookbroke bags, or through some limited boothing during a campus visit. These yield mixed results on depth of knowledge of OUSA and could point towards a need to change the nature, or increase the quantity, of engagement.

The quantity and quality being considered, the efficiency of delivery could be significantly better. While campaigns tend to try to use a simple AIDA design framework, there are some limited opportunities to increase mentions of OUSA wins, or OUSA's work on certain files such as OERs, opportunities that might not being effectively utilized now.

Recommendations*:

That OUSA dedicate one large campaign in the next two governing years to general OUSA awareness.

That OUSA place increased focus on making its Instagram account target the student population, and develop content accordingly.

*We ask that EAC carefully consider these recommendations, and based on the paradigm arrived at of importance of student engagement, alter them accordingly.

6b. *Engagement with Students At-Large. Campaigns*

Quantity	Quality	Efficiency
3	2	2

Findings:

Campaigns are run twice yearly, which represents about the amount that can be done with one person filling both the operations and communications roles.

While the quantity of campaigns is adequate, the Panel finds that there is still room for improvement. While metrics show success for some campaigns such as #TextbookBroke, there is still more improvement to be had on

process. Currently, campaigns are planned at the Strategy Conference, and the amount of professional advice provided on style of campaign by the Operations & Communication Director is often overwhelmed by individual SC member ideas. While this year's SC was deferential to the advice, this system provides the possibility of a campaign based on expert advice meant to engage the average student could be derailed by a persistent Board member. The Panel finds that OUSA should do more to protect the independence of Home Office in creation of campaigns.

However the panel finds that the density of OUSA campaigns may lead to lower engagement on some campaigns and effort would be more efficiently used in focusing on fewer more effective campaigns.

Gradual improvements are still needed on campaigns to reach more students.

Recommendations:

That OUSA determine what format best protects the strategic nature of the campaigns planning process.

6c. Engagement with Students At-Large, Opportunities for Participation

Quantity	Quality	Efficiency
3	3	2

Findings:

OUSA has a variety of opportunities for students to participate, including blogs, GA's, its summer internship and others.

The opportunities generally have OUSA staff support to help students be successful in participation, but there are no best practices documents, all delivery of best practices is haphazard. This represents a negative effect on both quality and efficiency, and the panel recognizes that OUSA should do more to give students information on how to be successful in these opportunities, and not duplicate effort.

Furthermore, the actual knowledge of the opportunity to be engaged is somewhat limited, creating a major informational barrier to participation of students. The Panel recommends that OUSA create a one-page overview of opportunities for students to get involved, and that it further promote opportunities for students in its presentations to governing bodies.

Recommendations:

OUSA should develop best practices documents for opportunities such as blog writing, and other opportunities presented to students at large.

OUSA should create a one-page document detailing the options for At-Large students to be involved with OUSA as an entry level document distributable by Feds.

iv) Conclusion

The panel concludes that OUSA's engagement is a key concern and found multiple areas requiring improvement, especially engagement with Feds governing bodies, marginalized student groups, general OUSA awareness, and opportunities for student participation.

However, though the panel sees engagement as a primary area for improvement, it does not necessarily see it as a critical problem, with zero categories receiving a designation that they were unacceptable and needed immediate improvement. However, many scores and areas indicate some improvement is required, with nine individual score scores across six broader categories being designated a score of 2, or 38% of scores across 75% of categories, supporting the panel's claim that engagement is an area of OUSA's that requires focus.

Section XIV: Long Range Planning

i) Overview

A long-range or strategic planning process is critical to allowing an organization to turn the values of its members and its limited resources into meaningful and measured positive change. This section explored the process surrounding OUSA's strategic planning process, most usually termed it's Long-Range Planning process.

ii) OUSA Long-Range Plan, Frequency

This covers the timing, frequency and duration of OUSA's Long-Range Plans. In the OUSA Governance Procedure, Long-Range planning is to occur at least once every 3 years. The length of the process is not defined, however based on the generally prescribed process, the strategic plan process typically takes approximately 6 months. In practice, the strategic planning process is usually initiated approximately 3 years after the creation of the last strategic plan, instead of strict three year cycles, the cycles instead are closer to four years, which are more in line with elections.

Recommendation: OUSA should change their Long-Range Plan frequency to once every 4, or more often, to better reflect election cycles in Ontario. The Strategic Plan should finish within twelve months of the election of the government.

iii) OUSA Long-Range Plan, Process

This covers the process by which OUSA conducts its Strategic planning process. This process is not formally specified.

1. Motion to Proceed

A motion is passed at steering committee to strike a strategic planning committee, and it is populated. In general, the committee is given a broad mandate to create the plan, with understanding that any major deviations from the typical process or format will require consultation before proceeding.

2. Review & Consultation Phase

Interviews are conducted with various stakeholders, the largest being the steering committee members themselves on the existing strategic plan, review of the long terms goals, and to suggest operational elements that they would like to see from OUSA going forward.

3. Identification of Strategic Values

From the consultation, the committee pulls common themes to suggest the strategic values and areas for the strategic plan.

4. Development of Strategic Directions

If additional consultation is required, the committee will do so, but if there is clear direction in values, the committee will also expand upon the strategic values to set strategic goals.

5. Drafting and Formatting of Plan

The plan is then drafted and formatted.

6. Approval of Plan by Steering Committee

The plan is subsequently reviewed and edited by the Steering Committee, and finally, approved.

iv) OUSA Long-Range Plan, Length and Format

The OUSA Long Range Plan generally consists of multiple sections including a foreward and detailing of OUSA's Vision, Mission, and Principles, its Strategic Goals, and its Areas for Growth under those Goals.

v) OUSA Long-Range Plan, Connection with Annual Plans

The OUSA Annual Plans are drafted by the ED with the strategic plan in mind, and reviewed by the steering committee. However, there is currently no linkage to ensure that the annual plans agree with the strategic plan. Furthermore, there seems to be little post-completion reflection upon long range plans, and increases to this could increase the efficacy of the long range plans going forward.

Recommendation: That at the time the Annual Plan is brought to Steering Committee, the Executive Director should also make a report on the status of the current strategic plan, and the relationship between the strategic plan and their presented annual plan.

Recommendation: Upon the transition from long range plan to long range plan, the Executive Director and Steering Committee should produce an internal document to review success of the previous strategic plans, what goals were not met, and what initiatives were abandoned and why.

Section XV. Conflicts between OUSA and Feds Policy

1. Introduction

One topic that the panel felt was important to investigate was whether OUSA policy greatly conflicted with Feds' own. VP Education Matthew Gerrits directed Research and Policy Officer Aisha Shibli to conduct an independent analysis of conflicts between OUSA policies with Feds policies, as well as any long-standing practices within the Federation, these findings are summarized in Appendix A.

2. Findings

Research and Policy Officer Aisha Shibli remarked that there is relatively little potential for conflict due to the highly provincial nature of OUSA policies, and the highly institutional or operational nature of Feds policies. One topic that was flagged as a potential area of disagreement by VP Education Matthew Gerrits was some discordance on freedom of speech, where OUSA called upon the government to repeal its Free Expression Directive, whereas Feds stands in favour of the University of Waterloo adopting the Chicago principles, which is what the directive enables. The OUSA stance, passed at the Fall 2018 plenary session, does not have language opposing the Chicago Principles, but rather focuses on the directive being imposed on Ontario universities.

Beyond this flag, the work of the Research and Policy Officer did not find any conflict between Feds and OUSA policies.

3. Conclusion

There is no cause for concern with regards to alignment of Feds and OUSA policy libraries.

Section XVI. OUSA's Strengths

1. Introduction

This section is the first of four which comprise a non-comprehensive SWOT analysis for the Ontario Undergraduate Student Alliance. These are a list of observations made by the panel in the course of its work. Strengths denote areas where the panel finds that OUSA is performing exceptionally well at, and that as such may require less effort and may be less prioritized for change, or that may be leveraged to achieve greater accomplishments.

2. Themes and Findings

1) External Relations

The panel was impressed with the level of influence, and number of stakeholders and partners OUSA has both in the government and non-governmental realms. While there is no particular improvement that is requested by the panel, the panel hopes that OUSA will pay specific attention to retention of these partnerships, and continuing environmental scans for new partnerships.

2) Finances and Return on Investment

OUSA's financial management to this point has been positive, when budgets have been reviewed by the panel. Similarly, for the level of contributions of Waterloo students, the return on their investment with regards to government announcements seems to be positive.

3) Research

OUSA's research capabilities are impressive, with both significant primary and secondary research informing OUSA publications and policy. The panel encourages OUSA to continue its high calibre of research.

4) Publications

One area of recent development that the panel is highly impressed with is the multi-stakeholder publication actions that OUSA has been leading on, both on *In It Together* and *Shared Perspectives*. The panel thinks that there may be limited numbers of topics which lend themselves to publications of this

calibre and visibility, but hopes OUSA will continue upon such courses of action if possible.

5) Policy Development

The panel finds that in particular, the rotating policy library with evidence driven recommendations and the PCR-bodytext format are all positive practices which ensure up-to-date, democratically driven, communicable and understandable policies. The panel recommends that these practices continue.

6) Student Leadership

The level of student leadership in the organization is commendable, with current or recently graduated students democratically elected or appointed by democratically elected student leaders comprising the entirety of the voting Board of Directors, playing an important role in strategic direction, advocacy actualization and financial oversight. The structure of the General Assembly allows policy stances to be democratically determined by students.

The panel affirms that democratic student leadership is a critical component of being an organization that represents students and hopes OUSA will continue with these practices.

3. Conclusion

The panel finds that OUSA does possess strengths that occur across different areas of OUSA's operations.

Section XVII. OUSA's Weaknesses

1. Introduction

This section is the second of four which comprise a non-comprehensive SWOT analysis for the Ontario Undergraduate Student Alliance. These are a list of observations made by the panel in the course of its work. Weaknesses are areas where the panel currently feels that OUSA should be performing better, or is performing worse when compared to most of its operations. Weaknesses can be areas of strategic focus, can represent opportunities for growth, or if not critical can be left as is if they are not an area of strategic focus.

2. Themes and Findings

1) Engagement with students

The panel finds that engagement with students, especially engagement with students at-large is lacking. The panel has made recommendations on making OUSA opportunities more accessible, increasing engagement with Feds Council, and other recommendations to improve engagement. The panel leaves it to EAC to have discussions surrounding what level of engagement is adequate for Feds members.

2) Visibility on campuses

Related to the above, OUSA brand visibility is significantly less than Feds' visibility on the Waterloo campus. Increased visibility allows for greater mobilization of students for campaigns, direct action, and develops a better OUSA-educated pool of future OUSA SC members. While this may not need to be a priority for OUSA, the panel would like OUSA to know it could be performing better in its on-campus visibility.

3) Linking OUSA actions to government actions

OUSA was able to provide the panel with a list of advocacy priorities for the last number of years as well as a number of resultant victories on the advocacy front. However, OUSA was not immediately able to provide a clear to understand linkage between policy recommendations, priority setting, actions taken while a policy priority, and then government outcome. Better being able to link actions to outcomes is important in demonstrating OUSA's role in bringing about change, something the panel found difficult to

approach when trying to calculate return on investment. The panel thinks that while this is not something OUSA must do to increase effectiveness, it would be prudent to do so for the sake of oversight and strategic direction by the steering committee, and for reviews such as this one.

4) Tangibility of OUSA Policy Recommendations

The Federation of Students expects that policies of an External Political Organizations have recommendations that are tangible. While upon applying the panel's own test on tangibility the panel found 61% of OUSA recommendations were tangible, Feds thinks more could be done in OUSA laying out its philosophy more clearly on the purpose of recommendations, and how it maintains tangibility when being aspirational.

3. Conclusion

The panel finds that none of OUSA's themes for weaknesses cause special cause for concern, however urge OUSA to consider its recommendations as it moves forward.

Section XVIII. Opportunities for OUSA

1. Introduction

This section is the third of four which comprise a non-comprehensive SWOT analysis for the Ontario Undergraduate Student Alliance. These are a list of observations made by the panel in the course of its work. Opportunities are areas where the panel sees opportunities for strategic direction to yield positive outcomes and increased productivity on the part of OUSA.

2. Findings

1) Visibility in Media

OUSA currently does have some media presence and in tracking OUSA outputs, the panel found that OUSA does strategically track media presence interviews. However, it is noted that CFS is often a go-to organization for media commentary. With post-secondary potentially having an increased amount of time in the spotlight due to policy decisions of the new PC government, OUSA should consider making increased media presence a priority.

2) Communication, Visibility, Accountability of OUSA Expenditures

While the panel has confidence in the financial management of OUSA, it has some concerns about how well a student on Students' Council might be able to interpret financial statements as presented in the current format. OUSA should consider development of a basic budget report beyond what is already compiled. We also advise OUSA to codify its process for when it selects new auditors. These steps will help provide more public confidence in the financial management of OUSA.

3) Procedure Review and Development

The panel notes that there are multiple good practices at OUSA, but that procedure as a tool is not often used, potentially creating a risk of losing good practices as staff in such a small organization turnover. Procedure as a tool provides an excellent opportunity to encode standard operating procedure.

3. Conclusion

The panel finds that there are some areas, especially with regards to its outward appearance to both member and non-member stakeholders, that could be improved by OUSA. The panel recognizes much of this hinges on individual steering committee members, but hopes that OUSA will see these opportunities as priorities.

Section XIX. Threats to OUSA

1. Introduction

This section is the final of four which comprise a non-comprehensive SWOT analysis for the Ontario Undergraduate Student Alliance. These are a list of observations made by the panel in the course of its work. Threats are areas where the panel sees significant risk of disruption to OUSA's work and wellbeing.

2. Findings

1) Financial Threat

While OUSA's financial management has been solid, there will soon be a new financial paradigm for OUSA as a member fee dependent organization. The Student Choice Initiative of the PC government will drastically reduce the predictability of OUSA funding, as OUSA fees will need to be collected separately, and can be opted out from. As such, OUSA will need to identify funding contingencies so that their spending does not lead to an undesirable financial position. OUSA should use reserves to maintain similar service levels this year, and use the data on opt-outs from member associations to determine what level of service will be possible and sustainable going forward.

2) Relevancy Threat

Many of OUSA's recent successes have come during the tenure of a Liberal government that shared many similar approaches about the post-secondary sector. With the advent of a new government, OUSA should ensure that it continues to be seen a fair broker, a principled actor, and a solution originator for the province of Ontario.

3) Documentation and Continuity of Internal Information

One threat to OUSA, encapsulated in recommendations around procedure development, is that OUSA is far more transitory in its nature than a member association or an organization with permanent staff, OUSA must take care to document things as well as possible, including their responses to this report. Doing so helps future student leaders and OUSA advocate more effectively.

3. Conclusion

The panel finds that there are threats, largely stemming from the emergence of a government that may be less beneficent to its critics, and who have created more financial volatility for students.

Section XX. Return on Investment

1. Introduction

The ultimate determining factor of membership in an external political organization should be gain for the member. In this case, to approximate gain, the panel has chosen to use financial gain of members of Feds as a proxy for the return on investment of those members' fees.

2. Methodology

VP Education Matthew Gerrits asked OUSA to summarize their achievements for students. In a separate section of the paper, the panel had already asked for a summary of the advocacy topics of the previous number of years. Using these priorities, VP Education Matthew Gerrits noted all of the “victories” that had seen OUSA lobbying action in the years preceding the change, made an estimation of the benefit of increased government spending on Waterloo students, and averaged it across all Waterloo students.

3. Findings

Table XX.1: Returns on Investment for Students from OUSA Membership

Year	Program	Gain	One-time v. Recurring	Attributable Actions	Notes	\$/student
2015	Elimination of in-study earnings from OSAP	220 million	Recurring yearly	SFA Advocacy in 2014	515000 undergraduates in Ontario + 180000 domestic college	316.54
2016	New OSAP	365 million	2017/2018	SFA Advocacy in 2014/16	May be too low due to unexpected uptake, is not calculated for the purposes of Waterloo students, doesn't account for lost tax credits, will now be reversed, but was experienced for two years	525.18
2017	Psychotherapy	73 million	One time	Mental Health advocacy 14-17	Across all adult Ontarians	8.11
2017	Frontline Mental Health Care	6 million	One time	Mental Health advocacy 14-17	For all Ontario campuses	8.63
2017-18	Career Kick Start	48 million	One time	Experiential campaign 2016, advocacy 2017	Is the university subset of 190 million in career kick-start	93.20
2017	Open Textbook Library	1 million	One time	OER advocacy 2017	Downstream effects not counted for	1.94
2018	Other Experiential Programs	132 million	One time	Experiential campaign 2016, advocacy 2017	Programs not specified by OUSA	189.93
Estimated Benefit 2014-2018						2618.33

One difficulty in assessing value for student dollars in external advocacy is the inability to accurately judge how much influence one organization's advocacy had on the decision making of a specific outcome. In general, the VP Education looked at the financial commitments made by the provincial government in connection with OUSA policies, priorities or campaigns, and whether there was some timely linkage between the advocacy and the financial outcomes. The VP Education then analyzed the amount of money that was allocated, and on a rudimentary level, how much money a mean UW student would receive throughout the past 4 to 5 years at Waterloo based on these investments alone. If these dollar amounts significantly exceed \$20 per student, the approximate amount a Fed's student spends on OUSA over 5 years, then the returns on investment for students are likely recouped based on actions OUSA has taken. If the amount of returns are below or nominally above \$20, a more extensive analysis on what role OUSA played in each of the financial returns, as well as non-financial concerns, would have been conducted. However, based on the analysis of the VP Education, the average Waterloo student likely would have realized an approximate \$2800 gain in student financial aid or in government investment in services over the last five years, not accounting for any previous OUSA victories, or any programs not cut.

While the effect of OUSA advocacy on some of these items may be disputed, one of the highlights were the changes made to OSAP, which were not a part of the Liberal 2014 platform, and incorporated a large number of elements, including the funding curve, from OUSA Student Financial Aid policy. These investments represent an average amount of grant funding equal to at least 525 dollars in grant funding per student per year in the years 2017 and 2018. Due to time constraints, many analyses were not undertaken in this report, such as observing effects of OUSA advocacy on party platforms, linking of specific OUSA asks with changes, forgone cuts, or attempted financialization of indirect benefits brought by OUSA to students.

4. Issues of Victory Claiming and One Clear Counterexample

Many of these victories are claimed by other groups as well. Because of the imprecise nature of advocacy and the many actors at play, it can be difficult to assess on each particular topic, how much of a role advocacy played. For the purposes of this analysis, attempts to apply any form of multiplier to the above gains was not applied and therefore was based on the assumption that a policy change that OUSA advocated for was based 100% off of OUSA lobbying. However, the panel wishes to draw attention to another item, which was later included in the OSAP transformation in 2016, and therefore not in the chart above. The Ontario government offered the 30% off tuition grant, later subsumed under OSAP grants. However, this policy only affects students in their 1st through fourth years. As a result of OUSA advocacy in 2014, with the only discernable partner being

Waterloo's then Co-op Education and Career Action centre, advocated on the policy, and saw the 30% rate extended the following year. The notes for calculation of this are listed below.

Table XX.2: Returns on Investment for Students from OUSA Membership- Addendum

Year	Program	Gain	One-time v. Recurring	Attributable Actions	Notes	\$/student
2014	Extension of 30% Tuition Grant to 5th year students	Unspecified by OUSA, calculated in Notes based on lowest current per-course tuition for a full time student..	Recurring yearly	SFA Advocacy in 2014	Tuition is 737 per course, times 4.5 for full course load times two times a year. Students eligible get 30% off tuition so multiply by 0.3. Gain was only for fifth year, multiply by 0.2. Gain was only for co-op students, multiply by 0.6. Gain was only for those with family incomes lower than 160k, multiply by 0.55 based on OPSSS data on family incomes of Waterloo students.	131.31

Assuming that even this victory alone could be attributed to OUSA at a rate of at least 20%, the average Waterloo student would have made their money back through their fees paid to OUSA, not even considering any other advocacy efforts or any other amount of value provided by other OUSA service outputs.

5. Conclusion

OUSA has represented a good return on investment to students for the amount of student fees directed to OUSA.

Section XXI: Options for Provincial Advocacy

i) Introduction

This section described the potential future paths for Feds with regards to provincial advocacy. This section outlines the cost and other considerations for pursuing five options: status quo, independent advocacy, alignment with CFS-Ontario, removal from proactive provincial advocacy, and attempting to create a new advocacy alliance. These scenarios are presented in no particular order.

ii) Option A: Continue with OUSA

This option outlines the option of Feds continuing membership in OUSA, status quo.

Considerations:

1. OUSA's operation has already had a thorough review in this report, something that has not been done by the Federation for any other option
2. Otherwise, one should consider the findings in this report, which largely indicates that OUSA is providing favourable levels of output with regard to research, policy and government relations, has been part of some policy actions that have represented positive return on investment for Feds members, and that they generally meet Feds bylaw and procedural requirements.

Cost: Expected to grow by approximately 2000 dollars each year, assuming a steady 2% CPI and nominally zero undergraduate population growth.

iii) Option B) Independent Provincial Advocacy

This option outlines the ability of Feds to withdraw itself from OUSA and conduct provincial advocacy on its own.

Considerations:

1. Feds could use its outsized standing and reputation among all political parties to push for change and greater access, and possibly create a more centrist reputation than OUSA had already done, possibly building more relationships with Progressive Conservatives, potentially at the cost of losing some bona fides with New Democrats. Feds could become more unabashedly pro-coop and push for more STEM heavy priorities.

2. Feds could have full autonomy over its own advocacy agenda. It should be noted that Feds is currently not poised to do so, and would likely take a number of years to build enough research and policy capacity to support independent provincial advocacy.
3. Feds currently does not research for nor develop provincial advocacy policies. To do so would likely require the hiring of another staff member to conduct research, help write policy, and conduct extra work with regards to stakeholder relations. An additional commissioner would also likely be required to help with policy process and with lobbying capacity.
4. There would be some additional cost to conducting lobbying meetings, as food and materials are currently covered by OUSA.
5. Lobbying would likely lead to fewer lobby meetings overall. Part of being an advocacy alliance means that people required to hold meetings are distributed among members. Cost of accommodation would shift from accommodating two (one hotel room) to potentially 3 or 4 (likely two hotel rooms) to expand ability to cover ground. Conferring with a student alliance who conducts their own lobby weeks, they spent approximately 1500 dollars for a 3 day, 14 meeting week.
6. Increased effort on the part of the VPEd with regard to managing the provincial advocacy profile, including increased work with the policy process, as well as public relations. This is usually outsourced to an Executive Director and OUSA President.
7. Politicians of all stripes are currently supportive of OUSA, and may have a negative reaction to seeing Waterloo striking out independently, especially if policy priorities are likely to be identical.
8. If Feds were to pursue a different policy agenda, it would be competing in the same space as OUSA, who would continue to have a large impact, without any influence on its policy.

Table XXI.1 Approximated Cost of Pursuing Option B

Item	Cost (Savings)
Leaving OUSA	(120 000)
Spending on Staff Capacity	57 000 + 8 400 + 1200/a
VPEd Time Costs (assuming identical to time spent on OUSA)	9 000
Cost of accommodation (4 day lobby week)(200/room*4 days*2 rooms)+ (4	2 200

persons* 3 days*[10/breakfast+15/lunch+25/dinner}	
Net	(41 800)

iv) Option C: Alignment with CFS-O

This option outlines the cost of reorienting Feds advocacy around the concept of membership in the Canadian Federation of Students and the Canadian Federation of Students- Ontario.

1. Change outputs. Generally, CFS-O policies do not seem to have the same PCR structure or the expansive body text included that OUSA policies do. CFS tends to run more campaigns, does run an Ontario lobby week, and do put on professional development events. Outputs would generally remain comparable, not accounting for increased cost.
2. Feds' ability to join the CFS, if it were willing, would likely require a major change to corporate bylaws, as certain CFS membership provisions, including provisions regarding termination of membership, are not compatible with Federation bylaws and procedure.
3. The Canadian Federation of Students has generally built a reputation as having some corporate practices which have been negatively viewed by the public, including some unresolved questions around a 2014 banking allegation. CFS consequently has claimed to have strengthened internal accounting protocols, but some of the negative reputation remains.
4. CFS advocacy may not be taken well by the current PC government, around whom the current Ontario PSE advocacy agenda will revolve for the coming years. Specific members may have negative feelings about the CFS, as perhaps indicated by messaging coming from the provincial government as a result of the Students' Choice Initiative.
5. Membership in CFS-Ontario would also mean membership in the national CFS, referenced in point 3. This would come with some advantages and some disadvantages, including possible estrangement from UCRU, which has largely sought to dissociate itself from CFS. Our common umbrella as UCRU currently does not require any formal membership nor extraordinary expense, and Feds retains a larger degree of influence over policy in the current group of 9 than in the scores of one-school-one-vote CFS locals.
6. Feds members would also benefit from CFS membership due to bulk-purchase discounts, including discounts when abroad through the International Student Identity Card, receiving handbooks similar to the Federation's own, possibly displacing ours, dental and pharmacy health maintenance organizations and

access to cheaper tax filing software. These do not impact Feds finances with the exception of student handbooks, but as student handbooks are currently operated at a roughly at-cost basis in Feds, they are not included below.

Table XXI.2 Approximated Cost of Pursuing Option C

Item	Cost (Savings)
Leaving OUSA	(120 000)
CFS Fees	580 000 + 11 600/a
Cost of accommodation, conferences etc.	Uncertain, assuming at least equal to 1 100 per year, given Option B analysis
Net	461 100

v) Option D: Moving to Reactive Only

This option explores the option of not pursuing provincial advocacy at all, or simply engaging on a reactive, press-release basis.

1. We have a duty to represent students. If students democratically decide not to engage in provincial advocacy, that is still a choice of representation. However, generations of students have invested in provincial advocacy, and as this report summarizes, have reaped some excellent benefits and return on investment. This decision would end the pay-it-forward approach that undergirds long-range advocacy in a high-turnover advocacy association.
2. We lose out on the ability to capitalize on the University of Waterloo's favourable position and image.
3. We would lack much ability to proactively address policy concerns, or to set the conversation, similarly to the way in which OUSA helped set the conversation on mental health in Ontario.
4. Feds could free-ride on the work of advocacy alliances such as OUSA or CFS-O, but free-riding is not sustainable if each school chooses to do so, and there is no guarantee that Feds could continue to free-ride, as the long term sustainability of OUSA could be threatened by the loss of its largest member.
5. Feds would lose the ability to have a decisive voice in directing the work of OUSA. Feds turns out OUSA executives and regularly brings at least 20% of voting delegates to OUSA plenaries.

6. Allows specialization on Feds university advocacy.

7. Politicians don't like variety in advocacy coalitions, they prefer to work with unified groups. Reactive advocacy may lead to annoying politicians who do not want to deal with a fractured advocacy landscape., Withdrawing effectively weakens the collective student voice in Ontario.

Table XXI.3 Approximated Cost of Pursuing Option D

Item	Cost (Savings)
Leaving OUSA	(120 000)
Net	(120 000)

vi) Option E: Creation of a New Advocacy Alliance

This option outlines a final course of action, to seek to create a new advocacy alliance.

1. At this time, there is not a large market for a new advocacy alliance, with most Ontario schools being a member of either CFS-O or OUSA, and VP Education Matthew Gerrits has not heard of any desire for a new group in the Ontario advocacy realm

2. Politicians don't like variety in advocacy coalitions, they prefer to work with unified groups. Reactive advocacy may lead to annoying politicians who do not want to deal with a fractured advocacy landscape.

Cost: Cost at this time is indeterminate, as no analysis has been done on what kind of outputs might entice a coalition to form. If numbers of contributing students were less than that of OUSA, one could generally expect to pay more than is currently paid to OUSA for the same level of outputs, due to efficiencies of scale.

vii) The Panel's Recommendation

At this time, the panel strongly discourages pursuing options C, D, or E. The panel recommends that EAC discussion be limited to options A or B. The panel's preferred option would be Option A, continued membership in the Ontario Undergraduate Student Alliance.

Section XXII. Questions for the Education Advisory Council

i) Introduction

This section is meant to form a summarization of high-level questions to the Education Advisory Committee to help provide guidance the future VPs Education on thinking about Feds advocacy through external political organizations.

ii) Questions

1. To what degree should Feds prioritize direct interaction and promotion of OUSA as a separate brand from Feds on campus?
2. What are our expectations of OUSA as an organization we are a member of, and what do we expect them to provide for us?
3. What are our expectations of who is responsible for general awareness of OUSA on our campuses?

Appendix A: Policy Conflicts

Table A.1: Review of OUSA Feds Policy Conflicts

OUSA Policies	Related Feds' Policies	Conflicts/Contradictions
<p>Teaching & Assessment</p> <ul style="list-style-type: none"> ● Improving teaching and learning ● Expanding high impact learning opportunities ● Enhancing inclusive learning environments 	<p>Policy 22: Plagiarism Detection Systems and Intellectual Property (expired) Policy 32: Course and Instructor Evaluations (expired) Policy 34: Grading equity (expired) Policy 45: Partial Grade Return</p>	<p>N/A</p>
<p>Technology Enabled Learning</p> <ul style="list-style-type: none"> ● Strengthen digital literacy ● Develop a digital infrastructure plan & support technology in classrooms ● Maintain affordable & quality online learning ● Invest in open educational resources 	<p>42 - Undergraduate Course Syllabi</p>	<p>N/A</p>
<p>Tuition</p> <ul style="list-style-type: none"> ● Restore public funding & regulate tuition ● Improve quality & address framework gaps ● Improve transparency ● Increase representation ● Maintain fair payment processes 	<p>Policy 18: Tuition Set-Aside (expired)</p>	<p>N/A</p>
<p>Stance on Freedom of Speech and Expression</p> <ul style="list-style-type: none"> ● Withdraw the “Free Speech Policy” directive (Jan 2019 deadline) ● If not withdrawn, Government should address various elements of the Freedom of Expression Directive 	<p>Policy 21: Freedom of Speech and Expression on Campus</p>	<p>Matt: Feds endorses the Chicago Principles whereas OUSA calls for the withdrawal of the Free Speech Policy Directive</p>

<ul style="list-style-type: none"> • Ensure anti-oppressive training and resources are provided to professors and teaching assistants 		
<p>Student Mobility and Credit Transfer</p> <ul style="list-style-type: none"> • Improving data collection and utilizing resources • Student transfer as a component of Ontario's post-secondary system • Improving consistency and setting common goals • Improving transparency and student resources 	Policy 17: Open Data Formats	N/A
<p>Mature Students</p> <ul style="list-style-type: none"> • Setting a Standardized Definition • Collecting Data • Removing Financial Barriers • Providing Equitable Support Services 	N/A	N/A
<p>Student Health & Wellness</p> <ul style="list-style-type: none"> • Improving Mental Health Care • Preventing Substance Abuse and Addictions • Improving Medical Accommodations and OHIP+ • Addressing Sexual Health Issues • Creating Physically Healthier Campuses • Addressing Student Food Insecurity 	<p>Policy 36: Campus Wellness (expired) Policy 47: Sexual Violence Prevention and Response Policy 40: Satellite Campus Policy</p>	N/A

<p>System Vision</p> <ul style="list-style-type: none"> ● Pursue Moderate Differentiation ● Promote Efficient Capacity Expansion ● Restore Sustainable Funding Models ● Integrate Policy Frameworks 	<p>Policy 11: Academic Cost Recovery (expired) Policy 18: Tuition Set-Aside (expired)</p>	<p>N/A</p>
<p>Accountability</p> <ul style="list-style-type: none"> ● Improving Quality Assurance Processes ● Re-envisioning the SMA Process ● Refining Governance Practices ● Expanding Ombudsman Mechanisms 	<p>Policy 1: Secrecy in University Governance Policy 8: Request for Minutes of University Bodies (expired) Policy 46: Ombudsman's Office</p>	<p>N/A</p>
<p>Indigenous Students</p> <ul style="list-style-type: none"> ● Early Outreach and Knowledge Recognition ● Increase Indigenous Student Financial Assistance ● Decolonize and Indigenize Institutions ● Consistently Fund Indigenous Support Services ● Develop Indigenous Experiential Learning 	<p>Policy 50: Indigenous Engagement and Inclusivity</p>	<p>N/A</p>
<p>Housing, Transit & Community Development</p> <ul style="list-style-type: none"> ● Plan & Develop Near-campus Neighbourhoods ● Provide Better Information & Education ● Amend the Residential Tenancies Act ● Strengthen the Landlord Tenant Board of Ontario ● Improve Inter-regional Transit Networks 	<p>Policy 26: Off Campus Housing Advocacy Strategy (expired)</p>	<p>N/A</p>

<ul style="list-style-type: none"> ● Increase Accessibility ● Develop Active Transit Routes ● Monitor Bylaw Implementation & Enforcement 		
<p>International Students & Education</p> <ul style="list-style-type: none"> ● Regulate fair and predictable international tuition ● Establish an international tuition set-aside program ● Improve access to employment and immigration ● Create more flexible study and work permits ● Provide affordable health coverage through OHIP ● Develop best practice models for student support services ● Incentivize cultural integration and internationalization ● Enhance accessibility and mobility of study abroad opportunities 	N/A	N/A
<p>Ancillary Fees</p> <ul style="list-style-type: none"> ● Establish a standalone ancillary fee protocol ● Mandate public disclosure of all ancillary fees ● Outline and articulate policies surrounding diverse fee types ● Entrench student union autonomy and oversight ● Implement fair cost sharing structures 	Policy 29: Ancillary Fees (expired)	
<p>Sexual Violence Prevention & Response</p>	Policy 47: Sexual Violence Prevention and Response	N/A

<ul style="list-style-type: none"> ● Establish a Sexual Violence Prevention Unit ● Invest in Prevention & Education ● Prevent Crime Using Environmental Design ● Improve Disclosure & Reporting ● Guide Resolution ● Implement Provincial Accommodations ● Use Legislation & Regulation Effectively ● Collect Accurate Data 		
<p>Rural & Northern Students</p> <ul style="list-style-type: none"> ● Enhance participation and persistence ● Provide more targeted funding for transportation costs ● Build robust inter-regional transit networks ● Invest in existing satellite campuses ● Increase access to work integrated learning 	Policy 40: Satellite Campus Policy	N/A
<p>Student Employment</p> <ul style="list-style-type: none"> ● Improve Transitions ● Compile Information & Expand Programming ● Increase In-Study Employment ● Expand Experiential Learning ● Encourage Employer Training ● Stimulate Entrepreneurship 	N/A	N/A
<p>Students with Disabilities</p> <ul style="list-style-type: none"> ● Remove Social and Systemic Barriers ● Streamline Academic Accommodation Processes 	Policy 35: Equity, Diversity, Inclusion, and Access (expired)	N/A

<ul style="list-style-type: none"> ● Dismantle Financial Barriers ● Strengthen the AODA 		
<p>Promoting Success through the Broader Learning Environment*</p> <ul style="list-style-type: none"> ● Provide opportunity for professional development ● Improve student support services ● Increase student space on campus ● Expand experiential learning opportunities 	<p>Policy 10: Professional Development*</p> <p>Policy 16: Academic Autonomy*</p>	N/A
<p>Reforming Ontario's Financial Assistance System</p> <ul style="list-style-type: none"> ● Help Families Save for Education ● Ensure OSAP Reflects Actual Costs ● Increase Effectiveness of Grants and Bursaries ● Make Institutional Financial Aid More Targeted ● Improve Availability of Systemic Information 	N/A	N/A
<p>LGBTQ+ Students</p> <ul style="list-style-type: none"> ● Resources ● Policies ● Training and Education 	<p>Policy 28: Gender Neutral Facilities (expired)</p> <p>Policy 35: Equity, Diversity, Inclusion, and Access (expired)</p>	N/A

**Note: Policy 10 discusses professional development (specific to staff and volunteers only); Policy 50 discusses student space (specific for Indigenous students); Policy 16 discusses experiential learning*

**Note: 20 OUSA policies and 22 (out of 56) Fed's policies listed*

Appendix B: OUSA Review Panel: Tangibility and Focus in OUSA Policy

i) Tangibility Test

For the recommendation, is this condition satisfied?

A similar policy been implemented in another similar jurisdiction

OR is an incremental change to an existing policy or program

OR does the policy ask align with policy supported by a major political party in Ontario

OR is a similar policy endorsed by an influential group that does not have a significant financial stake in passage of the recommendation

OR (the policy is similar in scale to achievements that OUSA has previously achieved AND uses conventional policy tools within government)

OR the nature of recommendation is contingent on a new development which means that the policy recommendation is highly innovative

OR (The recommendation a request for collection of data, for coordination between partners, creating a partnership, or developing a strategy AND Is the recommendation free or substantially free to execute)

If this condition is not satisfied, the recommendation is considered not tangible.

ii) Recommendations in Scope

For the recommendation, is this condition satisfied?

Does the recommendation ask for changes that occur prior to the university transition process

OR does the recommendation ask for universal societal changes that do not especially target students

OR (does the recommendation make recommendations to individual institutions AND these recommendations were made after OUSA developed a procedure to stop the practice of authors including institutional recommendations)

OR does the recommendation otherwise seemingly make recommendations that are not related to the post-secondary system in Ontario

If this condition is satisfied, the recommendation is ruled out of scope.

iii) Results

The analysis was conducted by manual coding by the Vice President Education, with the opportunity for any member to raise concerns with any of the coding.

Table B.1: Summary of Scope and Tangibility Analysis

Master Count of Recommendations	650	Total Fitting The Tangible or In-scope Definitions	Total Deviating from the Definitions
Tangibility Score (% Meeting Condition)	61%	359	234
Scope Score (% Meeting Condition)	91%	540	53
Recommendations that were Institutional issues before OUSA introduced its procedure*		57	

*Excluded from both tangibility and scope analysis

iv) Raw Data and Paper Level Analysis

Due to the size of the raw data, as well as the informality of some explanatory notes, the raw analysis has not been included in this report. The raw data was analyzed paper by paper, and each paper was given an individual score. Generally, the tangibility scores of these reports have improved over time.

Upon request of EAC or Council, a cleaned version of the raw data may be created within the timeline of approximately 4 weeks. Alternatively, a copy of this data with such limitations as have been stated, can be given to the Research and Policy Officer for in-person viewing upon request of any Councillor.

Appendix C: Consolidated Recommendations

Section V: Outputs

1. The Director of Communications and Operations should create an annual report for Steering Committee, including a breakdown of statistics on social media during a designated time period. This will insure that comparable and longitudinal information is on hand for strategic discussions.
2. The Panel recommends that OUSA increases its articulation of the specificity and segmentation of target markets for each of its platforms. This will help OUSA further specialize its tone and presence on each platform.
3. The Panel recommends that statistics around Academica Top 10, website usage, radio appearances, newspaper appearances, and other media engagements be included in an annual report to steering committee.
4. More comprehensive tracking of outcomes from campaigns and costs of campaigns should be conducted to help with strategic decision making surrounding future campaigns.
5. OUSA should provide a more systemic and early system of determining campaign dates for member associations to fill out.
6. OUSA should generate both a “Blog Writing Best Practices” document, and a Blog post style guide, similar to the style guide provide to student authors for policy papers. This would allow SC members to better convince students that they are capable of writing a blog post.
7. OUSA RPAs should generate a list of undercovered topics that student authors could be recommended to write on.
8. OUSA should have a discussion at Steering Committee on how to ensure the internship opportunities are communicated, and if there are any ways for OUSA's Home Office to support a more wide distribution of hires.
9. OUSA should promote the internship opportunity and conduct the process in February when more Waterloo students would be able to apply.
10. The Steering Committee should have a discussion about systematic review of procedure, and implement some process to ensure that procedures are reviewed every 2-4 years. The panel identifies this as a task that could potentially be delegated to the VP Human Resources & Administration.
11. OUSA should revisit the format of its policies to see if a more visually appealing and graphic-heavy format could and should be used, and if so how it should be implemented. This task should be overseen by the Steering Committee and could be a project for a summer intern with design skills.

12. OUSA should develop a form for questions to be asked in advance by Council members to frame the details of the presentation to the information requested by the member association.
13. OUSA should provide an explicit motivation for each activity conducted during campus visits, and revisit the concept of campus visits at Steering Committee to determine if they are effectively furthering the organization's goals.
14. SC should develop a procedure related to professional development which requires staff to fill out a minimum one page reflection on their PD experience and skills required, for both record-keeping and for the benefit of their supervisor.
15. The Director of Communications and Operations should revisit all feedback forms and edit them to ensure that they are able to assess whether attendees met learning objectives for the events.
16. Steering Committee and Home Office should consider the possibility of merging best-practice sharing day and training day to see if such a merger would be feasible and advantageous.
17. Tracking of attendance at OUSA PiHED should be collected by OUSA and track the type of organizations or attendees in attendance.
18. The OUSA ED or Director of Communications and Operations should monitor the overlap of alumni between the two alumni events to ensure that having two events effectively extends OUSA's influence.

Section IX: Post-Secondary Focus

19. OUSA should review the authorship process of policy papers to include measures during the editing process to identify and eliminate to prevent policy recommendations from falling out of scope of the post-secondary sector.

Section X: Assessment on Feds Autonomy

20. Current practices surrounding policy disagreements of a steering committee member and speaking on behalf of OUSA or their member association should be placed in procedure.
21. OUSA Steering Committee should revisit the obligations of OUSA members to ensure that the language accurately reflects current practice and ensures autonomy for OUSA members, and protection of deliberations in confidential session.

Section XI: Student Driven Leadership

22. OUSA Steering Committee members should be introduced to the strategic, human resource and policy roles they play, as well as corresponding duties in OUSA's governing documents no later than OUSA Strategy Conference.

23. The OUSA Steering Committee should also receive a presentation by the outgoing president delineating their roles and duties as a representative of their member associations, and as a fiduciary of OUSA, and to what degree their actions can be reflective of their representative nature.

Section XII: Financial Status and Management

24. It is recommended that the second bullet under the Purchases/Expenses section of the expense guidelines be changed to read 'written approval' instead of 'oral approval'.
25. For the purposes of financial transparency, executive accountability, and organizational stability, OUSA should begin to provide regular and high level financial reporting on a semi-annual basis to its' membership (to be disseminated to the members' students).
26. It is recommended that OUSA develop operating policies governing the selection of auditors which includes an auditor rotation provision that will be no longer than a period of 10 years.

Section XIII: OUSA Member Engagement with Feds

27. OUSA should conduct exit interviews with SC members to better evaluate its annual cycle of events.
28. OUSA should develop summary documentation of the roles of delegates during General Assemblies.
29. OUSA should maintain internal documentation accompanying each policy, including notes from breakout sessions and plenary, to help authors writing future papers to understand heterodox or outside views when formulating the next iteration of the policy, to ensure that dissenting voices are not forgotten in an organization with high turnover.
30. OUSA should work with the Feds VPEd to develop a common expectation of engagement with governing bodies.
31. OUSA should work to prepare materials for inclusion by the VPED in select Council reports, with a suggestion that such materials be delivered at least once per term.
32. OUSA should give more opportunity to involve our Marketing Specialist- Advocacy in the vetting of OUSA promotional material.
33. OUSA should provide resources for best practice sharing among research and stakeholder relations roles.

34. OUSA should facilitate and provide research advice on joint reports on institutional issues between researchers on various member campuses.
35. Small, identity specific information packages for paper-specific identity groups be created for distribution by SC members annually.
36. OUSA should keep files accompanying more equity focused paper, that can be updated at any time with concerns or problems identified by members at member associations, so that all of these topics are highlighted before interviews even begin for the authorship process.
37. OUSA should dedicate one large campaign in the next two governing years to general OUSA awareness.
38. OUSA should place increased focus on making its Instagram account target the student population, and develop content accordingly.
39. OUSA should determine what format best protects the strategic nature of the campaigns planning process.
40. OUSA should develop best practices documents for opportunities such as blog writing, and other opportunities presented to students at large.
41. OUSA should create a one-page document detailing the options for At-Large students to be involved with OUSA as an entry level document distributable by Feds.

Section XIV: Long-range Planning

42. OUSA should change their Long-Range Plan frequency to once every 4, or more often, to better reflect election cycles in Ontario. The Strategic Plan should finish within twelve months of the election of the government. [completed since drafting of the report]
43. At the time the Annual Plan is brought to Steering Committee, the Executive Director should also make a report on the status of the current strategic plan, and the relationship between the strategic plan and their presented annual plan.
44. Upon the transition from long range plan to long range plan, the Executive Director and Steering Committee should produce an internal document to review success of the previous strategic plans, what goals were not met, and what initiatives were abandoned and why.