



## University Students' Council of the University of Western Ontario **INTERIM & FINAL REPORTS PROCEDURE**

**EFFECTIVE:** Oct 15, 2013

**SUPERSEDES:** October 2, 2012

**AUTHORITY:** General Manager (Staff)  
President (Executive)

**RATIFIED BY:** Board of Directors

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**RELATED DOCUMENTS:**

- HR Directive

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### **1.00 PURPOSE**

1.01 The USC, for a variety of purposes, uses interim and final reports. The reports provide a corporate record and summary of the events and issues that were addressed during the term. As well, the reports provide direction and a framework to people who are employed in the positions in the future. The interim and final reports should:

- (1) Reflect the Mission Statement, By-Laws, and Policies and Procedures of the USC;
- (2) Provide guidance, suggestions and recommendations for the successor in addition to the members of the Executive Council, Corporation, and the Council to help move the portfolio forward; and,
- (3) Adhere to these guidelines to be considered an official document of the USC.

### **2.00 SCOPE**

- 2.01 The guidelines apply to all interim and final reports submitted to the USC including those submitted by the President, the Vice-Presidents, Coordinators, Commissioners, Interns, and Gazette Front Office staff.
- 2.02 The guidelines apply within the greater framework of the USC's Volunteer Management system.

### **3.00 STYLE AND CONTENT**

3.01 All reports shall:

- (1) Be clear and concise;
- (2) Not impair the conveyance of information that is either necessary or beneficial to the students and/or to individuals who hold the position in the future;
- (3) Not be confidential in its entirety. If a report is to contain confidential information, a non-confidential report shall also be made available;
- (4) Be marked clearly as confidential if a confidential report. All confidential reports and/or sections shall adhere to the same guidelines as non-confidential reports;



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- (5) Be written in a professional manner using professional language;
- (6) Be written in a professional and tasteful manner devoid of immaterial personal opinions;
- (7) References to individuals within specific positions should state the name of the position and not the name of the person;
- (8) Non-professional language includes, but is not limited to, racist, sexist, or potentially offensive language, personal attacks, and potentially libelous statements;
- (9) All reports shall be free of any spelling or grammatical errors.

3.02 Interim reports shall cover the period of time from the commencement of duties to the due date of the report, unless otherwise specified.

3.03 Final reports shall cover the entire duration of a term in office, unless an interim report has been submitted to cover another portion of the term.

**4.00 FORMAT**

4.01 All reports must be submitted in electronic form (Word format).

4.02 In order to maintain consistency, as well as ensure the succession of information, all reports shall follow the following structure:

SECTION	TOPIC	DETAILS
A	Goals	What were the specific goals that you set for your position?
B	Problems Encountered	List the problems that you encountered during your tenure and suggest (if possible) future solutions.
C	Recommendations	Possibly the most important section. Drawing on your experience, suggest recommendations for your successor.
D	Year-Specific Changes	List and elaborate on any fundamental changes in the portfolio that were enacted during your tenure. This information will be used to update the Job Manual for the position.
E	Conclusion	Provide any further comments that do not fit in any of the above sections.

**5.00 NON-COMPLIANCE**



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5.01 Failure to adhere to these guidelines shall result in a report not being approved by the USC Executive member responsible for reviewing and approving reports or the Board of Directors as well as forfeiture of any attached honoraria.

### **6.00 DEADLINES**

6.01 Coordinators shall submit an interim report to their portfolio supervisor no later than January 31st of the academic year.

6.02 Gazette Front Office Staff shall submit an interim report to the chairperson of the USC Board of Directors no later than January 31st of the academic year.

6.03 Coordinators shall submit a final report to their portfolio no later than April 30th of the academic year.

6.04 Gazette Front Office Staff shall submit a final report to the chairperson of the USC Board of Directors no later than April 30<sup>th</sup> of the academic year.

6.05 Honoraria for Coordinators and Gazette Front Office Staff shall be paid in two installments, with one installment following the receipt and approval of the interim report and the other installment following the receipt and approval of the final report.

6.06 The USC Executive and Interns shall submit a final report no later than four weeks after the end of their employment with the USC.

6.07 Late reports will be penalized 1.6% of the honorarium attached to the position or of the withheld salary of an Executive or Intern per day until submitted up to a maximum of thirty (30) days.

(1) Any penalty shall be subtracted from the overall value of the honorarium or salary that may be awarded.

6.08 The USC Executive member responsible for the reviewing and approving a report may waive section 6.05 of this document if a late report is accompanied by valid, written reasons justifying the lateness of the report. It is the USC Executive member's sole discretion to approve or decline written reasons for the lateness of the report.

(1) The Board of Directors may wave section 6.05 for USC Executive and Gazette Front Office reports following the same procedure as 6.08.

6.09 Sections 6.07 and 6.08 of this document apply to any and all interim and final reports submitted under this Procedure.

### **7.00 PROCESS OF APPROVAL**



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- 7.01 Members of the USC Executive are responsible for reviewing and approving interim and final reports written by volunteers and interns working within their portfolio. The USC Executive member reserves the right to approve a report in whole or in part.
- 7.02 The Board of Directors is responsible for reviewing and or approving USC Executive and Gazette Front Office reports. The Board reserves the right to approve a report in whole or in part.
- (1) If the Board of Directors cannot meet in a timely manner to approve a report, such as during the summer months of May, June, July, and August, the President and the Chairperson of the Board may approve reports on behalf of the Board. If the President is the Chairperson, a second member of the Board shall be selected as her designate.
- i. If the President and Chairperson of the Board, or her designate, cannot reach a consensus decision, the decision shall be put to the full Board at its next meeting.
- (2) Any USC Executive or Gazette Front Office report featuring confidential information in either the report itself or the discussion thereof shall be approved in an *in camera* session of the Board of Directors. USC By-law #1, section 6.19 should be consulted for clarification on what constitutes confidential information.
- 7.03 The USC Executive shall report approval or disapproval decisions at the next meeting of the Board of Directors.
- 7.04 Each report shall be reviewed by the Governance Officer (or designate) after being approved by the Executive or Board of Directors for confidential information prior to being made available to the public.

### **8.00 SIGNATURE AND DATE**

- 8.01 If a hard copy of the report is submitted in addition to the electronic copy, the report shall bear the author's signature on the final page of the report. Upon approval of the report, the appropriate President or Vice-President that oversees the portfolio shall also sign the report before placing it in the USC central filing system.
- 8.02 All reports must contain the date(s) the report was written as well as the academic year for which the position was held.