

USC CASA REVIEW - OUTLINE

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Introduction

As stated in By-Law #3, the USC is required to conduct a full review of our external political representative organizations every two years, with OUSA and CASA years alternating. We conduct these reviews to accomplish a certain number of goals. Firstly, we want to ensure that students' resources (money and the time of USC leaders) is used most effectively, and that future investment is feasible. Secondly, we check to see whether the practices, goals, and values of the external organization are still in line with the values and goals of the USC, and the students it represents.

The issues and discussions we are having about CASA are not new to this review, or this year. Many of the listed concerns have been noted in the past. In fact, the 2014 review is a furthering of discussions that have been occurring for the past 8 years, at least. As such, our intention this year has been to take some action to address these historic concerns. We did not want to conduct another review, note a number of concerns, and file it away for another year. As such, we began a process to bring about change. We engaged in discussions with CASA leaders in the early summer, organized an external review and reform process with all remaining Ontario schools in CASA, joined the by-law committee at CASA to actively try to bring motions and amendments, and engaged the USC Prov and Fed Affairs Standing Committee for discussions on next steps.

Quite simply, we have been intent on putting some time into understanding exactly what the shortcomings of CASA have been, and then working very hard to reform those practices, or at least set up the foundation for reform in the future. If we can sum this review up in six words, it would be 'No more talk, time for action.'

As this review will show, our efforts this year have unfortunately been met with inaction on the part of CASA's board of directors. Our months-long efforts to work actively with the organization to bring about a process for positive change has unfortunately had little success, due in our eyes to an organizational culture at CASA that leans towards inertia and the status quo.

In this review, we will outline the concerns we have had, the process we went through, and the result we ended up with. In the end, we pose the simple question: is CASA worth more than \$41 000 in membership fees, \$12 000 in travel costs, and the time of 2-3 USC leaders each year? In giving our answer, this review will lay out a number of suggested steps for the

future, which begin with a drop to associate status in CASA, and further reviews and work in the future.

Lastly, we will note that It has been three years since our last CASA review due to scheduling difficulties last year (when it was originally scheduled). We recommend that the CASA review again be prioritized for completion next year (as scheduled in by-law) in order to stay on schedule for future reviews.

SECTION ONE: THE PROCESS

1. Literature review of former USC final reports and reviews (July - Present)

We conducted a literature review of past final reports (notably those of Vice-Presidents University Affairs David Simmonds', Dan Moulton, Meaghan Coker, Patrick Searle, and Alysha Li) to better understand the thoughts of the USC's primary member to CASA during these years. We wanted to understand what the successes and weaknesses of CASA have been, and what efforts have been taken to address those weaknesses. Some of these comments are noted throughout this report, and many of the lessons and ideas are incorporated as well. The notes are in Appendix I.

2. Communicated concern re: policy and research process to entire membership at Policy Conference (July)

We first noted concerns with CASA practices at the CASA policy and strategy conference in July. When we realized that the policy process was ineffective and was not leading to educated decisions, we (Western, McMaster, and Waterloo) raised concerns to the general membership and advocated for an alternative process (the policy selection process used at OUSA) to be used. For example, the policy selection process was forcing members to choose between issues such as 'parental income exemptions' and 'summer income exemptions' for financial aid, even though they are the same broader issue (income exemptions). Unfortunately, the proposal for reform did not work succeed. Instead, we tried to move motions that would connect the separated issues (i.e. motion to combine the 'income exemption' policies into one file, instead of keeping them all separate). Some of these motions were successful, but the process was inconsistent, difficult, and completely based on one subsection of the membership trying to make change.

3. Met with CASA Board Chair, National Director, and Stakeholder Relations Manager to discuss concerns about policy and research process, voting structure, and membership-home office dynamic (July)

At the same conference in July, the USC President and Vice-President met with some of the main leaders of CASA to communicate concerns, and to ask for their help in bringing about reform. This marks the first official

meeting where the concerns being brought forth in this review were discussed, in this term. The help of the CASA leaders was sought because, as was seen during the policy selection process, the large and unrepresentative plenary structure at CASA makes it impossible for balanced and fair discussions to come to fruition. Therefore, it was clear that if any change was to be made, it necessitated the help and leadership of CASA's Board and National Director.

4. VP External joined CASA By-law committee to directly propose amendments to current CASA by-laws to address voting structure, coordination of members, student union autonomy. (2-3 times a month, starting July, continuing to present)

At this same conference, the USC VP External joined the CASA by-law committee on behalf of Western, and as a part of the external review comprising all of Ontario, in an effort to have a discussion with CASA's leaders about necessary changes. In this committee, the VP External is also able to bring about motions and amendments to directly reform CASA's by-laws. Unfortunately, the opportunity to do so has not yet been provided, despite repeated recommendations that these discussions happen sooner, rather than later. This work is continuing.

4. Began 'CASA Reform' process with all remaining Ontario schools in CASA; Western, Waterloo, Brock, McMaster (September, October)

After the summer period ended with no action from CASA, the Ontario schools banded together to create an external review and reform group. In this group, all the concerns noted in this review were raised and recorded, and a select number chosen to communicate to the CASA Board of Directors at the Advocacy Week conference in November. The original plan was to bring these changes to the membership, but the Ontario group realized that the best plan of success was to enlist the help of the Board of Directors in having an organization-wide discussion about necessary changes. This process took approximately two months of discussion.

5. Presented our list of concerns and requests for change to the CASA Board at the CASA Advocacy Week in Ottawa (November)

The list of concerns and requests for reform were presented to the Board of Directors at CASA in November, with Western, McMaster, and Waterloo

(Brock was unable to attend due to scheduling conflicts) all sharing the concerns we had discussed in the months prior. This meeting was mostly uneventful, with some Directors expressing sympathy and the need for further discussion, and other Directors dismissing the concerns that were raised. In all, it was decided that further discussion was needed.

6. Followed up the presentation with a formal letter on along with all other Ontario schools, to the Board (December)

The discussion referenced above was formally expressed in a letter to the Board of CASA, on behalf of all Ontario schools. This letter is attached in Appendix IIIb.

7. Sent a longer, more detailed, USC-specific letter to CASA Board along with the Ontario letter, and asked for a reply on action items and steps moving forward.

The USC sent a more detailed and western-specific letter to the Board asking for reform in certain areas. This letter is also attached in Appendix IIIa.

8. Conducted feedback session with Provincial and Federal Affairs Standing Committee, and sent survey to the committee and students-at-large. (Jan SC meeting)

The USC Associate Vice-President External (Brian Belman) and Federal Affairs Commissioner (David Zhang) conducted a feedback and discussion session with the Standing Committee on Provincial and Federal Affairs, which took the place of the ad-hoc committees struck up in the past (as the PFA Standing Committee is now tasked with all legislative matters related to Provincial and Federal Affairs). The results of this discussion, and of the questionnaire sent in advance, are attached in Appendix IV. The results are also analyzed in this review, and incorporated into the recommendations.

9. Received response from CASA Board (Sunday Jan 26)

A response was received by the Board to both the Ontario and USC letters. It is attached in Appendix II, and analyzed in this review.

10. Compiled internal and external reviews to create final review and set of recommendations (Week of Jan 27)

11. Presented to Standing Committee on Provincial and Federal Affairs for approval (Feb 6, 2014)

SECTION TWO: FEEDBACK PROCESS

To strive for a complete review, in early January, the Western USC conducted both a student-wide and a USC leaders' survey on CASA's representation at Western University.

STANDING COMMITTEE DISCUSSION AND RESPONSES

In this section, we will briefly outline the ideas raised by Standing Committee members in this discussion. The full survey and results are attached in Appendix IV.

Firstly, USC council leaders expressed that “The USC and Western students should expect the federal representation to **be aware of the needs and concerns of students** through research and outreach and to **advocate on their behalf to improve post-secondary education** in Canada,” and that CASA should operate on the basis of “Fair and accurate representation that is based on **active, current student research** (ie. surveys, forums, round tables, etc.) and responsive to changing opinions and current events.” Lastly, leaders said CASA should be “An effective, organized, and **impactful federal lobbying body that has well-developed relationships** with both MPs and public servants in Ottawa.” Lastly, 5 committee members expressed a desire to see CASA take on a proportional representation system, with 1 councillor responding that they preferred the one-school-one-vote model. Some councillors expressed that the question could have been perceived as leading, which is a criticism that is well-taken and will be recorded for future reviews.

Councillors also stated that effective research was a crucial part of federal advocacy, and that CASA should never take ‘half-measures’ that weaken its arguments. As well, outreach to students to hear concerns and ideas is a very crucial part of advocacy work. As well, one committee member expressed the desire to see CASA work more with other advocacy

groups, to create a more unified voice.

As to the overall benefit and presence of CASA for western students, one committee member summed the views of the committee up by stating that “CASA provides Western students with a **federal advocacy presence** in order to work with the government on issues such as the National Student Loans Program. However, as far as the perception of CASA goes, **there isn't much that has been seen by students**, as CASA does not do the best it can with regard to a **presence** on campus. Moreover, the nature of CASA as a group representing so many schools results in smaller schools getting a disproportional amount of representation compared to schools like Western.”

As to CASA’s responsibility to its members, two committee members said, “To actively gather information, to use this information to accurately **represent** students, and to actively **report back** to the student body on progresses made,” and that “CASA should be responsible for making an **honest effort with regard to collecting feedback** from it's constituents in order to properly represent them. Additionally, CASA needs to be **accountable for it's shortcomings** by providing honest reports on it's progress and challenges, as well as publishing it's audits to ensure that it is being financially responsible.”

When asked about CASA’s positive characteristics, committee members said that CASA’s mission and values are well-structured and are valuable, and that its approach to presenting meaningful reform ideas to the government is a positive one. When asked about characteristics of CASA that elicit concern, committee members stated that CASA is perceived to be “too moderate, too willing to play ball.” Two committee members expressed concern in CASA’s ability to balance small schools and large schools, staying that “The main challenge with CASA is it's ability to represent a varying and diverse array of interests from schools across Canada. Moreover, the degree to which CASA can **balance the organizational capacity of member schools** is a concern that would be difficult to rectify within the organization itself.”

GENERAL STUDENT RESPONSES

We received 30 respondents from the populace-at-large. While this number is greater than that which would have come to a town hall, the number of respondents means we are hesitant to say this is a representative opinion, but this can be seen as a small snapshot of the opinions of the general student population.

Firstly, 72.4% of students responded that their knowledge of CASA was either below or way below average. Similarly, in regards to CASA's presence on campus, over 93.1% of Western students perceive below to way below average CASA presence at Western. While this definitely highlights some inadequacies of communication with the current External portfolio, the lack of any campaign created by CASA for its members this year (a yearly practice in all other advocacy organizations) makes it difficult for the USC to highlight its work on campus. Second, when asked to choose, in their opinion, the best voting model, 89.7% of respondents indicated that they desired proportional representation in contrast to CASA's current One-School-One-Vote system.

Already, we have seen that students at Western have had little to no exposure to the federal advocacy efforts led by CASA. Next, we wanted to know what our students expected from federal representation. The main response we received was that our students had no idea what to expect from federal representation. Tied for second were the expectations of representation & advocacy as well as fighting on behalf of students to minimize the financial burden of pursuing a post-secondary degree. Other expectations included the belief that CASA should be a thought leader on federal issues and a need for effective and timely advocacy.

In all, students expressed that they were unfamiliar with CASA due to its low presence on campus. This is certainly a lesson for the current External leaders, as well as the CASA leaders in charge of creating campaigns.

SECTION THREE: REVIEW AND REFORM

INTERNAL REVIEW: CASA and the USC

Throughout our months of engagement and review of CASA's practices, we came up with a comprehensive list of all of our concerns and issues with the organization. We compiled these practices into one document, and sent a formal letter to the Board of CASA. We requested a reply on how the board might be able to help us bring about positive reform. In this section, we will outline our concerns, and then present CASA's response.

Effective Coordination of Members

- **Best Practice:** There should be a structure in which members are incentivized to have regular meetings and interactions, be they in person or over telephone, to discuss advocacy issues, organizational issues, and policy. The structure should also allow for effective representation of CASA across the country, with spokespeople for the organization able to engage with local, regional, and national media on CASA issues and asks.
- **Barrier to achieving this Best Practice:** Unlike many provincial organizations, CASA members do not meet regularly to strategize and discuss issues, mostly due to geographic distance between members. This can place CASA lower on the list of priorities of student organizations, as it is more difficult to be consistently engaged with other members and with issues between conferences. Secondly, the student leader of the organization, the board chair, cannot adequately represent the organization across the country due to the challenges that time and space impose. This limits CASA's profile across the country.
- **Recommendation:** CASA should structure its board of directors regionally in order to allow for more constant contact between members and to provide for more effective regional representation in media and with stakeholders. Firstly, the member of the Board for each region can serve as the 'Chair' of that region's caucus, calling monthly or bi-monthly meetings of that caucus. This could mean caucuses for members from the West (Alberta, BC, Manitoba), Ontario, and the Maritimes. This allows for a membership that is more engaged and strategic in its thinking, doing substantial work between conferences. Secondly, the chairs of these caucuses can serve as regional spokespeople for the organization, allowing for highly effective advocacy to partners in that province, and the media. While concerns around enshrining regionalism are valid, the USC believes that some amount of regionalism already exists in CASA, and has significant potential for positive impact on the organization's coordination and representation.

Fair Voting Structure

- **Ideal:** Students should be represented proportionally at decision-making points on policy, issues, and organizational matters.
- **Barrier to Achieving this Ideal:** CASA makes claims to advocacy legitimacy based on how many students it represents, but it does not make decisions (policy, advocacy, organizational) based on how many students it represents. Instead, CASA makes decisions in a way that is functionally one-

school-one-vote, failing to reflect the actual representation of students among its members. Currently, decisions are made that a significant proportion of CASA's students do not agree to, but this is not reflected in voting. Students from larger schools (Western being the largest) are severely underrepresented. This is a clear disconnect, and must be rectified. In fact, given the large increase in smaller schools in CASA, it is essentially impossible for the USC to exercise any proportional voting power, despite reforms initiated by the USC years ago.

- **Recommendation:** CASA adopt a proportional voting structure, to accurately and fairly reflect the representation of students among its members. The Board of Directors and Committees should maintain one-school one-vote structures. This is the same structure used by OUSA.

Autonomy of Student Unions

- **Ideal:** Student organizations must be free to join and leave CASA as their own policies and by-laws dictate. The principle of easy-in, easy-out is incredibly important in student advocacy and the freedom for student unions to join and leave as their members decide must be preserved.
- **Barrier to Achieving this Ideal:** This is certainly not a current barrier, but some preliminary discussions at CASA surrounding by-law changes have floated the idea of a mandatory two-year leaving process for CASA. This quite simply flouts the principle of easy-in easy-out, and limits the ability of student associations to choose their exact relationship with CASA.
- **o Recommendation:** CASA must be wary of these considerations as by-law changes are discussed. This section of the letter is meant to simply communicate the importance of this principle, as discussions go forward.

CORRECTION: Upon further discussion with CASA, we realize we were wrong about this being a potential requirement. In fact, it is a current requirement in CASA's by-laws. That is to say, the practice is already in place.

More Effective Fee Structure

- **Best Practice:** A fee structure that is tied to student representation at each member school, and that allows the organization to conduct research, advocacy, and other processes to adequately serve the number of students it actually represents.

- **Barrier to Achieving this Ideal:** CASA artificially caps schools' membership fees, with schools of various sizes paying the same amount. Not only does this limit proportional representation (student voice seems to be intentionally limited through a fee cap), it also limits contributions that could contribute to robust advocacy and policy. Given its size and scope, CASA's budget is too small to meaningfully engage with the hundreds of politicians, civil servants, committees, stakeholders, and other groups needed to adequately advocacy at the federal level. As well, the use of fees is not consistently and transparently communicated to student associations.
- **Recommendation:** CASA remove the fee cap and tie member contribution to the number of students each association represents. CASA should use this funding to more adequately engage in the sector, in the manner that home office and the Board see fit.

Policy Process:

- **Best Practice:** A process where the membership identifies overall thematic goals (i.e. address youth unemployment, rising costs at universities, financial aid, etc), and tasks home office with researching those ideas. Students and staff work together to create developed policy that is then heavily vetted by membership, before becoming standing policy. This creates a thematic policy process that incentivizes CASA working as a visionary group.
- **Barrier to achieving Best Practice:** Currently, shorter policies lead to a lack of cohesion among our policy statements because they are not linked thematically. This leads to a lack of articulation of a vision for post-secondary education in Canada. Further, this impacts the prioritization process because policies are "pitted against" each other for the purposes of voting when they may equally contribute the member priorities and goals.
- **Recommendation:** Appendix III has the detailed recommendation on this, created by the USC, McMaster Students' Union, Waterloo Federation of Students, and the Brock University Students' Union.

Research Process

- **Best Practice:** CASA should be constantly researching to support lobbying briefs, policy papers, general day-to-day lobbying. Home Office should have the autonomy (and the responsibility) to conduct research, constant literature reviews, surveys, issue research, journal readings, and attend research conferences to expand policy stances and brainstorm new stances, to bring to the membership.

- **Barrier to Achieving this Ideal:** Currently, CASA's research process is highly decentralized and overwhelmingly committee-based. This means that research occurs if and when a member decides they have an issue they want to explore, rather than the permanent staff of CASA (who have the most knowledge and exposure to federal advocacy) identifying opportunities and acting on them, with the direction of the membership.
- **Recommendation:** This is contingent on a reform of the policy process, but CASA should invest in a more centralized research process, where thematic priorities are identified by the membership, heavily researched by home office, and used to support policy papers, advocacy documents, submissions, etc.

Clarity of roles between general membership and Board of Directors

- **Best Practice:** A relationship between the membership and the board where the membership decides policy, and the board decides on advocacy--given its close relationship to the issues, home office, and day-to-day work. The membership must have a way to trust the board to make these decisions, given that not every member of the organization is represented on the board.
- **Barrier to Achieving this Ideal:** Currently, the board does not take a leadership role in the organization, and does not set advocacy and organizational priorities. Quite simply, the Board seems to be a group that discusses the organization's financial and legal health, has some limited coordination role, and sits at the front during plenary. This results in CASA being highly limited in how visionary and strategic it can be as an organization.
- **Recommendation:** CASA should establish a relationship where membership decides policy and the Board decides advocacy priorities, given their close nature to the work. A regional structure could establish the trust necessary for this to occur.

Non-partisanship in CASA:

- **Best Practice:** CASA must be a completely non-partisan entity, giving itself the potential and ability to engage with any party or stakeholder on any issue.
- **Concern:** Recently, the Board Chair made a public endorsement of a Conservative Party of Canada nominee in Alberta. While this is something that occurred outside of her official duties as CASA's leader, it is important to recognize that leaders' public stances are tied to the organization

regardless of what capacity those remarks are made in. Actions such as these have a strong potential to damage CASA's credibility, which in advocacy and lobbying is its lifeblood.

- **Recommendation:** A very clear policy be established that CASA Directors, Board Chair, and Home Office staff not be permitted to engage in public partisan roles.

THE EXTERNAL REVIEW

For space considerations, the External Review and Reform process conducted by the 'Ontario Group' is presented in Appendix IIIb. The issues outlined in the external review are largely the same as those outlined in the internal review.

TAKING THE ISSUES TO CASA'S LEADERS

INTERNAL REVIEW - RAISING THE ISSUES TO CASA

After months of compiling former reviews and conducting an external review (which follows next) we submitted the comprehensive list above to the Board of Directors of CASA, as well as to the National Director and home office. The following section details the responses we received from the leaders of CASA.

RESPONSE PART ONE

Issues raised:

- Effective Coordination of Members
- Fair Voting Structure
- Autonomy of Student Unions
- More Effective Fee Structure

Answer Provided:

- "In addressing the recommendations and proposals outlined, we as the Board of Directors have had to balance the scope and nature of many of the recommendations with CASA's responsibility to its membership in its entirety. These specific concerns are of fundamental importance to the entire organization, directly impacting all members. Each of these

recommendations pertains to a fundamental value currently held by CASA, and as such, require the Board to defer to the membership as a whole for a recommendation. It is due to the application of this principle as to why our response will group these together.

Though it is our role to represent and speak on behalf of CASA's membership throughout the year, we must continue to be mindful that this power is only allocated to us in--trust until CASA's membership as a whole can meet, discuss and take action. We endeavour to act in accordance with the memberships' will, and such these areas of debate and discussion, are best addressed if they are presented to the membership as a whole. “

Action: The Board and CASA home office staff are available to work with Western USC to develop and discuss specific proposals and reforms. In addition, the Western USC has the ability to bring forth any motion at a CASA plenary.

Review Analysis:

While the USC understands the requirement of the board to ensure this discussion is had with the full membership, it is disheartening to read this response. In effect, this response says that any reform efforts must be spearheaded and taken to membership by the USC. Quite simply, if this was possible in the culture of CASA, it would already have been done, and the Board would never have even been contacted with this letter. Unfortunately, the culture of CASA leans towards inertia and the status quo, and the USC and all Ontario schools were seeking the leadership of the Board of Directors in creating a process to hear these complaints, and bring about discussions about tangible reform. The fact that there is no process or appetite to have a mediated and led discussion on member complaints is one of the factors that leads the USC to feel completely disenfranchised at CASA. The USC was hoping for leadership and guidance from the Board, and not to have the Board state that they cannot lead the process, as is their responsibility as leaders at CASA.

RESPONSE PART TWO:

Issues Raised

- Policy Process

- Research Process,
- Clarity of role of Board and General membership

CASA Response

*Responded in External review process, which follows.

Review Analysis:

This section commits the Home Office at CASA to studying a potential process for policy reform. This will be presented at the Annual General Meeting in March. This might have the potential to be one positive improvement at CASA, but the reform proposal itself has yet to be seen. Similarly, it is not known whether the proposal will pass a membership vote.

Secondly, the Board response to the issue of clarity between the Board and General Membership was disappointing, as it stated that the powers and duties of the Board vary with the aspirations and goals of that Board and membership. This is an inconsistent structure, which again leads to a lack of clarity in roles. When compared to the role of the OUSA Board of Directors, the CASA model is unfortunately inadequate. We very much hope to see more engagement by the Board in creating a more consistent and predictable role.

RESPONSE PART THREE:

Issue Raised

Home Office--Membership Dynamic

CASA Response

“In regards to addressing the relationship between home office staff and the membership, we acknowledge the concern brought forward, but wanted to highlight some of the places where home office is empowered to share their opinions.

Currently policy and research staff work closely with members of the policy committee. They are in continuous communication with the committee members providing research, ideas and opinions on policy as it is being

developed. In addition, any member at any time is able to request from staff their opinion or thoughts on policy as it is being discussed and debated in plenary.

Action: We understand that at the end of the day everyone involved with CASA want the best policy possible. As a board we will engage with home office staff to discuss how we can continuously work towards creating a fluid and strong exchange of ideas and opinions between home office staff and membership. The Board has directed the National Director to make it clear to staff that they are expected to, and responsible for, providing members with their professional opinion upon request.”

Review Analysis

It is a positive step that the Board has directed the ND to make it clear to staff that they are expected to provide members with their professional opinion “upon request.” However, the difficulty the USC and Ontario schools have had, is that that request is very rarely made by the members, as the culture of CASA does not prioritize the expertise of CASA staff. When that request is made, therefore, the staff are hesitant to give advice, given that the culture often will not thank them for it. The USC and Ontario ask has been that the Board lead a discussion among members, and look to actively lead the organization out of that culture. That step has yet to be commented on by the Board.

RESPONSE PART FOUR:

Issue Raised

Non-partisanship and the neutrality of CASA

CASA Response

“Finally, CASA’s commitment to non--partisanship has been central to its operation since it’s founding. As a cherished value of the organization, it is our responsibility as the Board of Directors to uphold it. CASA will always continue to work with parties of all political stripes and ensure these relationships remain strong.

Action: CASA's board has found the best way to live up to this value is by engaging in dialogue with its strong, active and engaged membership who continues to provide us with feedback. By having actively engaged members it is the best way we can ensure CASA's board can be made aware of and respond appropriately to anything that threatens this."

Review Analysis

The USC is quite disappointed to see a request for a policy enshrining non-partisanship be ignored entirely. The response from the Board simply re-states that non-partisanship is important to CASA, and it thanks any members who are committed to keeping it that way. No mention of the Chair's conduct was made, and the request for a policy was not mentioned either. This, unfortunately, denotes much of the culture of the status quo at CASA.

PART FOUR: ALTERNATIVES

While we do not believe it is in the effective scope of this review to recommend an alternative to CASA (as even if the recommendation of this review is undertaken, the USC will still be a member of CASA for at least one more year), we have identified four possible alternatives, and recommend that next year's executive explore these as they conduct their scheduled CASA review.

Alternative 1: The USC is currently exploring a possible federal advocacy conference suggested by Pat Whelan, USC President. It is called 'STUDENTS 15' and is meant to be a student counterpart to the "U15" group of research schools, which have joined together to represent Canada's largest R&D schools to the federal government. The USC executive is looking to implement this conference in April, and a number of schools have expressed interest in attending. The work of this conference will be highly limited for a number of years, if successful, but this might be an option to explore and expand in the future.

Alternative 2: The Canadian Federation of Students. CFS is a national organization with provincial chapters, and it does federal and provincial advocacy. CFS is a highly principled and active organization, with significant media presence. Previous USC OUSA and CASA reviews have

analyzed CFS as an alternative, and have all decided that it is not a recommended alternative for the USC, given that the scope of its advocacy often goes beyond student issues, and the fact that some of its membership practices can be concerning. Lastly, membership in CFS represents a high student fee (over \$15, compared to CASA's \$1.64), and necessitates joining CFS-Ontario as well.

Alternative 3: Many student leaders have expressed that OUSA might be able to take over some federal advocacy. Given that most federal advocacy issues usually relate to provincial programs, or the coordination of the provincial government, OUSA's mandate might be expanded to include federal advocacy. This would mean OUSA would partner with its provincial counterparts (Students Nova Scotia, Caucus of Alberta Undergraduate Students, Alliance of British Columbia Students) to coordinate a national advocacy plan. This is an option that can be considered in the future with by next year's executive, with the OUSA President of that year.

Alternative 4: There is also the option of no longer doing federal advocacy. Schools such as Laurier and Queens do not conduct any federal advocacy, and their councils have expressed no concern at this change. Waterloo is also moving away from federal advocacy. The USC council can decide not to continue advocating federally, but this is a decision that must be made with serious consideration for long-term student interests.

In all, this review has not made a recommendation as to any alternative, but it has laid out four potential alternatives for next year's team to explore, as they decide what the future of the USC in CASA will be.

PART FOUR: SUGGESTED STEPS

- 1) **This year:** The USC should follow the best-practices of schools such as Mount Royal University and the University of Waterloo, and reduce its involvement to an associate-level (or equivalent) position in CASA. As an associate member, the USC is able to meaningfully assess CASA's efforts as a federal representative body, in a way that it can't as a full member.
- 2) **Next year:** As an associate member, the USC is able to make the choice of whether it stays or goes, given that its next move must either be to join back

up as a full member, or to leave the organization fully. It is recommended that next year's council assess CASA's efforts to implement reform.

If effective reform (or real, meaningful willingness to effect reform) are noted by the USC, then it is recommended that the USC join back as full members.

If this does not occur, and the same issues persist without resolution, it is recommended that the USC leave CASA upon the completion of its next negative review.

CONCLUSION

After years of having the same discussions about the same issues, we firmly believe it is time for the USC to take real action on our role in CASA. We present this report to the Standing Committee on Provincial and Federal Affairs, and hope to engage in a discussion about how we can best move forward with regards to our role in CASA.

In the end, “be it resolved that the USC reduce its membership in CASA to an associate-level membership or its equivalent in CASA’s new by-law, to be passed this calendar year.”

APPENDICES

APPENDIX I: THOSE INVOLVED IN REVIEW

- USC Executive Representation
 - Patrick Whelan, USC President
 - Amir Eftekarpour, USC VPX
 - Brian Belman, USC AVPX
 - David Zhang, USC Fed Affairs Commissioner
- Council Representation
 - All members of Standing Committee on Provincial and Federal Affairs
- External Partners
 - Spencer Graham, McMaster Students' Union VP Education
 - Adam Garcia, Waterloo Federation of Students VP Education
 - Roland Ermin, Brock University Students' Union VP University Affairs

APPENDIX II: HISTORY AND LIT REVIEW

To better understand the USC's historic concerns with CASA, we read the final reports and reviews passed by previous councils.

Report #1 – VP University Affairs 2011-2012: “Patrick Searle”

- “After all that optimism about OUSA, I do shift my views a bit regarding the USC's involvement with CASA, the Canadian Alliance of Student Associations.”
- “The networking opportunities are boundless, the people are positive and like-minded ... but I think some serious thought needs to go into the value and the necessity of Western remaining a member of this organization.”
- “Like everything we do at the USC, we need to make sure that what we spend our funds on are relevant to students and the return on investment is high enough to justify the cost. For CASA, I really think that it sits on a fine line between valuable and useless.”
- “When I got home from Ottawa in November 2011, I sat down with the Gazette and told them all about what we had lobbied for on the Hill ... the interview was great, but it was the identical interview VP UA's and former presidents had given before me.”
 - o “In November 2008, an almost eerily identical interview with President Stephen Lecce took place, where he described the lobby priorities which I was still lobbying for three years later.”
 - o “Each year, we find ourselves repeating history and asking for the same three things that we never seem to get.”
 - o “I just do not believe CASA is as pragmatic as it should be when it comes to working with a Conservative majority government, or as effective as it should be in its government relations' efforts.”
- “In 2011/2012, we did see a few long-term planning discussions take place and a strategic plan be adopted by the General Assembly. These are positive steps forward to ensuring the future of CASA is clearly envisioned. But whoever is VP UA after me has to be able to objectively answer a question

that for so long as been uncomfortably side-stepped because of the boldness of what the latter recommends: should [we] stay or should we go.”

- “Confronting this question ... needs to occur so that Western students do not see their student fees going down the drain in the name of federal advocacy measures.”

Reoccurring Concerns & Recommendations (From March 2009 review)

Recurring Concerns

- 3 of 6 concerns outlined in the 2009 CASA review have been directly repeated in this year’s 2014 review
 - Concern 1 - The CASA voting structure does not fairly balance member interests
 - “it is no longer acceptable for the undergraduate students at Western. The CASA voting structure, at present, does not manage to strike a fair balance between the competing needs of associations across the country. Most notably, in this case, is the number of students represented by members.”
 - “The current model is overly simplistic and not equally reflective of the needs of all members. The USC’s experience with the Ontario Undergraduate Student Alliance (OUSA) demonstrates that a mixed form of representation is possible and perhaps necessary for mature organizations such as CASA.”
 - Concern 4 - The CASA [Organizational structure - Clarity of roles of Board of Directors & General membership; Home Office-GM dynamic) structure is not effective in its current state
 - “The role and responsibilities of this position remain unclear, as does the accountability of such. There is a lack of effective regional dialogue, as well as a lack of measurable objectives associated with the position.”
 - Concern 6 - CASA members have little interaction with officers of the general assembly, creating unclear lines of authority and accountability
- The USC currently shares all 6 concerns that were brought up five years ago including the following
 - Concern 2 - CASA does not have appropriate structures or mechanisms in place to adequately respond to membership reviews
 - “CASA does not have a process of responding to reviews made by member associations.”
 - Concern 3 - CASA does not meaningfully partner with provincial associations in pursuit of shared goals
 - “While federal representation has been deemed important and necessary for a number of issues, there is a clear benefit for organizations to draw upon one another as resources in pursuit of a shared vision.”

- Concern 5 - CASA has not consistently provided adequate communication of lobby activities and political opportunities to its member associations
- “it is a concern for the USC that this process is not as regular or effective as necessary. In order to enhance the advocacy pursuits of the organization, it is necessary that member associations receive more regular communication specifically pertaining to lobbying efforts.”
- “Moreover, the USC is concerned that CASA’s attempts to improve communications with its members are lacking direction or focus, and require more consideration of what will aid in achieving the organization’s advocacy priorities.”

Repeated Recommendations

- 7 of 8 past recommendations originally brought forth in the 2009 review have been repeated in the 2014 CASA review, five years later
- Recommendation 1 - The CASA voting structure should more fairly balance the varying interests of member associations
- “adoption of a model that specifically addresses disparities based on the number of students represented by member associations. A voting structure that does not disadvantage students from large institutions is required in order to meet the needs of undergraduate students at Western.”
- Recommendation 2 - CASA should implement a mechanism by which to receive and assess all membership reviews, communicating next steps or concerns to member associations.
- “The USC appreciates that the responsibility to direct changes contained herein rests on our delegates to CASA. However, as previously outlined, it is a concern for the USC that there are no mechanisms by which to assess the issues meticulously prepared by members. As a result, it is necessary that CASA embrace the goal of continuous improvement through a process that supports member reviews.”
- Recommendation 3 - CASA should re-assess its current policy and research development process and work more effectively with partner provincial groups in pursuit of shared goals.
- Recommendation 6 - CASA must regularly provide more comprehensive information to member associations regarding lobby activities, and commit to, when appropriate, discovering and communicating political opportunities to member associations as they arise.
- Recommendation 7 - The work of the officers of the general assembly of CASA must be more frequently and comprehensively communicated to members.

APPENDIX III:

- **USC letter to CASA**
- **Ontario Group letter to CASA**
- **CASA response to USC**
- **CASA response to Ontario Group**

Board of Directors
Canadian Alliance of Student Associations
130 Slater Street, Suite 410
Ottawa ON
K1P 6E2

December 13th, 2013

To the Directors of the Canadian Alliance of Student Associations,
This letter is a follow-up of our November 20 discussion regarding our concerns with some of the areas of the organization. In addition to the letter sent in partnership with our peers at Waterloo, Brock, and McMaster Universities, this letter is meant to signal some of the concerns the University Students' Council at Western University has with CASA, and the areas for improvement we have identified. We request a response by January 25th, 2014, in advance of our council meeting on January 27th, 2014. In the response, please indicate how CASA could look to address these concerns, and please indicate some form of action plan or timeline for addressing these concerns. We will use this response as part of our scheduled CASA review, which will form the basis for our decision on what our future in the organization is.

• **Effective Coordination of Members**

- o **Ideal:** There should be a structure in which members are incentivized to have regular meetings and interactions, be they in person or over telephone, to discuss advocacy issues, organizational issues, and policy. The structure should also allow for effective representation of CASA across the country, with spokespeople for the organization able to engage with local, regional, and national media on CASA issues and asks. This allows members to be more effectively engaged, and for CASA to achieve a more consistent profile in media and with leaders, across the country.
- o **Barrier to Achieving this Ideal:** Firstly, CASA members are spread across the country, making coordination and discussion between conferences very difficult. Unlike many provincial organizations, CASA members do not meet regularly to strategize and discuss issues. This can place CASA lower on the list of priorities of student organizations, as it is more difficult to be consistently engaged with other members and with issues between conferences. Secondly, the student leader of the organization, the board chair, cannot adequately represent the organization across the country due to the challenges that time and space impose. This limits CASA's profile across the country.
- o **Recommendation:** CASA should structure its board of directors regionally in order to allow for more constant contact between members and to provide for more effective regional representation in media and with stakeholders. Firstly, the member of the Board for each region can serve as the 'Chair' of that region's caucus, calling monthly or bi-monthly meetings of that caucus. This could mean caucuses for members from the West (Alberta, BC, Manitoba), Ontario, and the Maritimes. This allows

for a membership that is more engaged and strategic in its thinking, doing substantial work between conferences. Secondly, the chairs of these caucuses can serve as regional spokespeople for the organization, allowing for highly effective advocacy to partners in that province, and the media. While concerns around enshrining regionalism are valid, the USC believes that some amount of regionalism already exists in CASA, and has significant potential for positive impact on the organization's coordination and representation.

- **Policy Process:**

- o **Ideal:** A process where the membership identifies overall thematic goals (i.e. address youth unemployment, rising costs at universities, financial aid, etc), and tasks home office with researching those ideas. Students and staff work together to create developed policy that is then heavily vetted by membership, before becoming standing policy. This creates a thematic policy process that incentivizes CASA working as a visionary group.
- o **Barrier to Achieving this Ideal:** Currently, shorter policies lead to a lack of cohesion among our policy statements because they are not linked thematically. This leads to a lack of articulation of a vision for post-secondary education in Canada. Further, this impacts the prioritization process because policies are "pitted against" each other for the purposes of voting when they may equally contribute the member priorities and goals.
- o **Recommendation:** Appendix A has a detailed recommendation on this.

- **Research Process:**

- o **Ideal:** CASA should be constantly researching to support lobbying briefs, policy papers, general day-to-day lobbying. Home Office should have the autonomy (and the responsibility) to conduct research, constant literature reviews, surveys, issue research, journal readings, and attend research conferences to expand policy stances and brainstorm new stances, to bring to the membership.
- o **Barrier to Achieving this Ideal:** Currently, CASA's research process is highly decentralized and overwhelmingly committee-based. This means that research occurs if and when a member decides they have an issue they want to explore, rather than the permanent staff of CASA (who have the most knowledge and exposure to federal advocacy) identifying opportunities and acting on them, with the direction of the membership.
- **Recommendation:** This is contingent on a reform of the policy process, but CASA should invest in a more centralized research process, where thematic priorities are identified by the membership, heavily researched by home office, and used to support policy papers, advocacy documents, submissions, etc.

- **Fair Voting Structure**

- o **Ideal:** Students should be represented proportionally at decision-making points on policy, issues, organizational matters.

- o **Barrier to Achieving this Ideal:** CASA makes claims to advocacy legitimacy based on how many students it represents, but it does not make decisions (policy, advocacy, organizational) based on how many students it represents. Instead, CASA makes decisions on a one-school-one-vote basis, failing to reflect the actual representation of students among its members. Currently, decisions are made that a significant proportion of CASA's students do not agree to, but this is not reflected in voting. Students from larger schools (Western being the largest) are severely underrepresented in all but special resolutions. This is a clear disconnect, and must be rectified.
- **Recommendation:** CASA adopt a proportional voting structure, to accurately and fairly reflect the representation of students among its members. The Board of Directors and Committees should maintain one-school one-vote structures.

- **Clarity of roles of Board and General membership**

- o **Ideal:** A relationship between the membership and the board where the membership decides policy, and the board decides on advocacy--given its close relationship to the issues, home office, and day-to-day work. The membership must have a way to trust the board to make these decisions, given that not every member of the organization is represented on the board.

- o **Barrier to Achieving this Ideal:** Currently, the board does not take a leadership role in the organization, and does not set advocacy and organizational priorities. Quite simply, the Board seems to be a group that discusses the organization's financial and legal health, has some limited coordination role, and sits at the front during plenary. This results in CASA being highly limited in how visionary and strategic it can be as an organization.
- **Recommendation:** CASA should establish a relationship where membership decides policy and the Board decides advocacy priorities, given their close nature to the work. A regional structure could establish the trust necessary for this to occur.

- **Autonomy of Student Unions**

- o **Ideal:** Student organizations must be free to join and leave CASA as their own policies and by-laws dictate. The principle of easy-in, easy-out is incredibly important in student advocacy and the freedom for student unions to join and leave as their members decide must be preserved.
- o **Barrier to Achieving this Ideal:** This is certainly not a current barrier, but some preliminary discussions at CASA surrounding by-law changes have floated the idea of a mandatory two-year leaving process for CASA. This quite simply flouts the principle of easy-in easy-out, and limits the ability of student associations to choose their exact relationship with CASA.
- o **Recommendation:** CASA must be wary of these considerations as by-law changes are discussed. This section of the letter is meant to simply communicate the importance of this principle, as discussions go forward.

- **More effective fee structure**
 - o **Ideal:** A fee structure that is tied to student representation at each member school, and that allows the organization to conduct research, advocacy, and other processes to adequately serve the number of students it actually represents.
 - o **Barrier to Achieving this Ideal:** CASA artificially caps schools' membership fees, with schools of various sizes paying the same amount. Not only does this limit proportional representation (student voice seems to be intentionally limited through a fee cap), it also limits contributions that could contribute to robust advocacy and policy. Given its size and scope, CASA's budget is too small to meaningfully engage with the hundreds of politicians, civil servants, committees, stakeholders, and other groups needed to adequately advocacy at the federal level. As well, the use of fees is not consistently and transparently communicated to student associations.
 - o **Recommendation:** CASA remove the fee cap and tie member contribution to the number of students each association represents. CASA should use this funding to more adequately engage in the sector, in the manner that home office and the Board see fit.

- **Home Office-Membership Dynamic**
 - o **Ideal:** A dynamic where membership can feel comfortable with having blue-sky visioning and brainstorming opportunities, but know that home office staff's expertise is there to not only bolster their ideas, but to challenge them to consider alternatives, and to warn against bad decisions. Home office should be comfortable challenging the membership.
 - o **Barrier to Achieving this Ideal:** Currently, CASA home office is hesitant to challenge the membership and often stays quiet during policy discussions, where their contributions could be very meaningful. This can result in lost opportunities for contextual information to be provided during discussions that could make CASA policy and other advocacy efforts both more relevant and more effective.
 - o **Recommendation:** Through communication and discussions, establish a dynamic between the membership and home office, where that relationship of trust can exist. We need to have a frank discussion about allowing CASA home office the autonomy to bring recommendations and ideas to the membership, and to challenge the membership's thinking on issues. This is an opportunity for the Board Chair to take leadership as the link between home office and the membership.

- **Non-Partisanship and the neutrality of CASA**
 - o **Ideal:** CASA must be a completely non-partisan entity, giving itself the potential and ability to engage with any party or stakeholder on any issue.
 - o **Concern:** Recently, the Board Chair made a public endorsement of a Conservative Party of Canada nominee in Alberta. While this is something that occurred outside of her official duties as CASA's leader, it is important to recognize that leaders' public stances are tied to the

organization regardless of what capacity those remarks are made in. Actions such as these have a strong potential to damage CASA's credibility, which in advocacy and lobbying is its lifeblood.

- o **Recommendation:** A very clear policy be established that CASA Directors, Board Chair, and Home Office staff not be permitted to engage in public partisan roles.

Thank you for your time and consideration

Regards,

Pat Whelan, President
Amir Eftekarpour, Vice-President External
Brian Belman, Associate Vice-President External
David Zhang, Federal Affairs Commissioner

University Students Council, Western University

APPENDIX A – POLICY PROCESS CHANGE

CASA Policy Reform

Introduction

Effective Student advocacy in PSE depends on student leaders making principled arguments and backing them up with effective evidence. This model of researched solutions has been shown to be successful in many jurisdictions and has helped establish students as thought leaders in Canada's post-secondary education system.

While CASA has strong research capacities, it has not used its capital most effectively in the recent past. CASA policy currently articulates single recommendations or asks, as opposed to establishing a broader vision on a single topic and incorporating multiple asks into it. For example, instead of articulating a vision on student financial assistance at the federal level (and incorporating multiple SFA issues, such as income exemptions, asset assessments, grants, etc), CASA has limited itself to single asks or recommendations, such as an in-study income exemption. This limits CASA's ability to serve as a thought leader in post-secondary education and creates a less comprehensive approach to advocacy.

This proposal is intended to recommend a re-thinking of CASA's policy process, focusing on broader visioning and comprehensive recommendations, as opposed to single-issue papers. This approach, which works well in Ontario and Alberta, can help establish CASA as a student thought leader in advance of a possible government shift or change in 2015.

Policy Process

- 1) Student leaders articulate important issues and priorities for the year, in broad terms
 - a. For example, “Financial Assistance,” “Student Health,” and “Aboriginal Students” might be identified as priorities for the year at TransCon or even earlier at AGM (for the next year).
- 2) Research staff undertake research projects to flesh out the issue areas
 - a. Staff undertake literature reviews, primary research and other work to develop a set of Value, Obstacle, and Solution statements.
 - b. Values: These value statements express what CASA students believe in, broadly. For example, “Student financial need should be assessed in a fair and consistent fashion.”
 - c. Obstacles: These are impediments to those values being expressed in real policy. For example, “Student financial assistance incorporates assumptions of parental contribution and summer income, which can negatively impact accurate assessment’s of students’ financial burdens.”
 - d. Solutions: These solutions are intended to follow the value and obstacle statements and provide solutions to address the identified obstacles as well as express the articulated values. For example, “Parental income should be removed as a factor in CSLP assessment.”
- 3) Student leaders assemble and write policy papers, assembling the VOS statements to create full papers.
 - a. Multiple VOS statements (on a broad scope of issues, under the same theme of ‘financial aid,’ etc) are brought together to create a full paper. For example, parental income, summer, in-study and asset assessment would all be brought together under one paper, to articulate a broader vision on financial assistance.
- 4) These papers are discussed by the CASA assembly, vetted and dissected during policy and strategic conference and passed into policy to be used as standing policy.
- 5) Briefs for meetings, talking points for media and lobby priorities are all taken out of these standing policy papers, depending on political opportunity and circumstance.

The current model of policy and advocacy endorsement at CASA Policy & Strategy Conference is not reflective of the political landscape in Canada. Our suggestion is to begin the endorsement process with recommendations from Home Office Staff. The main reason for this is that home office staff generally has a very high degree of knowledge and experience in the PSE sector. Home office staff members are also well-versed and up-to-date on current events on Parliament Hill from previous months.

At Foundations, we recommend that home office bring forward advocacy highlights from the previous year to begin to inspire members to think about the current political landscape. These highlights include any CASA ‘wins’, any significant headway made on particular issues, and what PSE and non-PSE issues the major parties are most engaged with at that time.

From there, the membership should be prepared to have structured and strategic conversations at Policy & Strat in June. Instead of having committees vote to endorse policies that they like the most, or those that fit best with the committee's mandate, we should be having a discussion on what can actually be accomplished and what agenda CASA needs to push to create political space for our ideas.

This is one of the main differences between this proposal and the current model: the period of time between Foundations and Policy & Strat should be used purely for learning and getting informed as members about the issues and the current political context. So instead of having committees continuously vote to endorse policies throughout the summer, any meetings should be a place where ideas and issues are shared for the purposes of educating the members to have informed discussions at Policy & Strat.

Once Policy & Strat begins, members would hopefully have a better idea about potential priorities for the year and the time at the conference could be used more effectively. The Policy & Strat days could be better used for more productive conversations. Some sample questions for structured discussion at Policy & Strat include:

- Which issues are currently on the federal government's agenda?
- Which issues did CASA push hard for last year?
- Where do the parties traditionally/realistically stand on PSE issues?
- Which issues has the government recently taken action on, or already been resolved?
- Which PSE topics are at a standstill? Why?
- Which asks do we most want to advance?
- Which issues could we realistically advance?
- How should we be advocating each particular issue? Government submissions, briefs, plans, and visions from CASA, Lobby Week, campaigns, media spotlights?

These conversations could be facilitated in a number of potential formats at Policy & Strat, including:

- Breakout sessions lead by Home Office staff individually. Could group people randomly, divide by region, or by area of interest.
- Open forum discussions and debates.
-

Decisions on advocacy priorities should be made by building consensus as much as possible. With 23 member associations and often more than double that number of delegates, this may be a difficult task; however the task becomes easier when the membership is highly informed about the issues and political context. At the end of the day, voting may end up having to be used, but the candidate policies/asks would be narrowed down as much as possible by consensus and achievability.

Conclusion

Overall, we feel these changes will provide a much better context to our members and that ultimately, we will be more able to facilitate our message going forward. We will be more able to facilitate a proper message, one that is more in-tune to the specific

agenda items that are being discussed within Parliament but also a better facilitated message that is in line with what has been discussed in the past.

It is critically important that we, as an organization, continue to build upon the past successes and conversations that our predecessors of CASA have started. By implementing this new policy endorsement direction, we will be better able to continue those messages from previous years and ensure an up-to-date message is being delivered as well. Our time during Advocacy Week is limited, in that we only have approximately 30 minutes to make our important endorsements to Senators, MPs and other people within the federal sector. By ensuring that these messages build upon past conversations but are also relevant, is vitally important because of the lack of time and ability to have more than one Advocacy Week in a year.

By targeting board areas of importance (eg. financial assistance), we can then identify the values, obstacles and solutions associated with each area. Furthermore, by writing in-depth policy papers based off these board areas, we are better able to get at the root of each issue (eg. removing parental income from CSLP's) and also provide a much larger context to speak to during our lobby meetings. It is important to be well prepared for these meetings so we can provide a wealth of speaking points depending on the direction of each meeting. Furthermore, we will then have a document which contains many solid, time-invested endorsements that can also be looked at outside of Advocacy Week.

We firmly believe that these changes would greatly help CASA provide even more of a federal educational impact in the near future. Below we have outlined the specific asks/changes needed based off this discussion:

Board of Directors
Canadian Alliance of Student Associations
130 Slater Street, Suite 410
Ottawa ON
K1P 6E2

December 2, 2013

To the Directors of the Canadian Alliance of Student Associations,

This letter is a follow-up of our November 20 discussion regarding our concerns with policy development and setting advocacy priorities. Again, we would like to reiterate that this letter is not intended to signal dissatisfaction with membership with the CASA; we will communicate individual concerns with Home Office and the Board. Our intention with highlighting these concerns is to identify areas for improvement in enhancing the advocacy that CASA does on behalf of its members.

The items we discussed at this meeting include:

- The format of policies: Currently, shorter policies lead to a lack of cohesion among our policy statements because they are not linked thematically. This leads to a lack of articulation of a vision for post-secondary education in Canada. Further, this impacts the prioritization process because policies are “pitted against” each other for the purposes of voting when they may equally contribute the member priorities and goals. Our suggestion is to begin to construct policies thematically, so that all policy statements related to a common theme (e.g. financial assistance, student health, academic materials) are linked to common principles and visions and research. Over time, existing policies should also be combined thematically or absorbed into broader researched policy papers.
- Selection of advocacy priorities: The format of policies leads to a priority selection process that leads to disjointed outcomes, in our opinion. The current priority selection process divides policies into asks, and pits them against each other when a focus of the membership may be much broader than one or two smaller asks. Thematic policies will allow the membership to select three or four thematic priorities, and for Home Office to implement those with the most opportunity and traction. While the membership should be involved in the selection of advocacy priorities, the ability for progress on “low-hanging fruit” should not be ignored for the will of the membership. Further, we believe that we currently select too many advocacy priorities leading to unfocused communication from the membership to the federal government.
- Clarity of roles between the general membership and the Board of Directors: We believe a greater distinction should be developed on matters of policy development and advocacy priority selection between the general membership and the Board.

Overall, we believe that CASA should be a thought leader in post-secondary education at the federal level. To put CASA into this category will require a focused approach over the coming months, prior to the Annual General Meeting that we are willing to actively participate in with the Board to present to the membership.

If you have any further questions or concerns, please do not hesitate to contact any of us. We look forward to your response.

Regards,

Amir Efetkarpour
Vice-President External
University Students Council, Western University

Roland Erman
Vice-President University Affairs
Brock University Students' Union

Adam Garcia
Vice President Education
Federation of Students, University of Waterloo

Spencer Graham
Vice-President Education
McMaster Students' Union



CANADIAN ALLIANCE OF STUDENT ASSOCIATIONS
ALLIANCE CANADIENNE DES ASSOCIATIONS ÉTUDIANTES

Pat Whelan, President
Amir Eftekarpour, Vice-President External
Brian, Belman, Associate Vice-President External
David Zhang, Federal Affairs Commissioner
340 UCC Building
University of Western Ontario
London, Ontario N6A 3K7

January 25, 2014

Dear Pat, Amir, Brian, and David,

RE: Letter to the CASA Board of Directors dated December 13, 2013

The Board of Directors of the Canadian Alliance of Student Associations (CASA) would like to thank the University Students' Council at Western University for the thoughtful, comprehensive, and detailed letter. The time and effort placed in drafting the letter is apparent, and the proposals and recommendations outlined and articulated have improved our understanding of many opportunities available to CASA moving forward. Please accept this letter as our response in addressing these and our corresponding action item for addressing these concerns.

In response to:

- Effective Coordination of Members
- Fair Voting Structure,
- Autonomy of Student Unions, and;
- More Effective Fee Structure

In addressing the recommendations and proposals outlined, we as the Board of Directors have had to balance the scope and nature of many of the recommendations with CASA's responsibility to its membership in its entirety. These specific concerns are of fundamental importance to the entire organization, directly impacting all members. Each of these recommendations pertains to a fundamental value currently held by CASA, and as such, require the Board to defer to the membership as a whole for a recommendation. It is due to the application of this principle as to why our response will group these together.

Though it is our role to represent and speak on behalf of CASA's membership throughout the year, we must continue to be mindful that this power is only allocated to us in-trust until CASA's membership as a whole can meet, discuss and take action. We endeavour to act in accordance with the memberships'

will, and such these areas of debate and discussion, are best addressed if they are presented to the membership as a whole.

Action: The Board and CASA home office staff are available to work with Western USC to develop and discuss specific proposals and reforms. In addition, the Western USC has the ability to bring forth any motion at a CASA plenary.

In response to:

- Policy Process
- Research Process, and;
- Clarity of role of Board and General membership

In regards to the recommendations outlined for reforming the policy process, priorities selection process and the clarity of roles, CASA's Board would direct you to review the attached letter to the undergraduate student representative associations of Brock University, McMaster University, the University of Waterloo and your own council, for our comprehensive response and recommendations.

In response to:

- Home Office-Membership Dynamic

In regards to addressing the relationship between home office staff and the membership, we acknowledge the concern brought forward, but wanted to highlight some of the places where home office is empowered to share their opinions.

Currently policy and research staff work closely with members of the policy committee. They are in continuous communication with the committee members providing research, ideas and opinions on policy as it is being developed. In addition, any member at any time is able to request from staff their opinion or thoughts on policy as it is being discussed and debated in plenary.

Action: We understand that at the end of the day everyone involved with CASA want the best policy possible. As a board we will engage with home office staff to discuss how we can continuously work towards creating a fluid and strong exchange of ideas and opinions between home office staff and membership. The Board has directed the National Director to make it clear to staff that they are expected to, and responsible for, providing members with their professional opinion upon request.

In response to:

- Non-partisanship and the neutrality of CASA

Finally, CASA's commitment to non-partisanship has been central to its operation since it's founding. As a cherished value of the organization, it is our responsibility as the Board of Directors to uphold it. CASA

will always continue to work with parties of all political stripes and ensure these relationships remain strong.

Action: CASA's board has found the best way to live up to this value is by engaging in dialogue with its strong, active and engaged membership who continues to provide us with feedback. By having actively engaged members it is the best way we can ensure CASA's board can be made aware of and respond appropriately to anything that threatens this.

Once again we would like thank you for the time and effort put towards addressing your highlighted concerns. We would like to follow up this letter with an offer to come and speak with yourselves and the Western USC, so we can address any specific concerns in a direct and responsive fashion.

Sincerely,

CASA Board of Directors



CANADIAN ALLIANCE OF STUDENT ASSOCIATIONS ALLIANCE CANADIENNE DES ASSOCIATIONS ÉTUDIANTES

January 25, 2014

Dear Amir Efetkarpour, Roland Erman, Adam Garcia and Spencer Graham,

RE: Letter dated December 11, 2013 regarding points of concern with CASA operations

The Board of Directors of the Canadian Alliance of Student Associations (CASA) would like to thank all of you, and your respective councils, for engaging with us in a productive way to improve CASA. Through your letter and the discussion we had prior to it at CASA's National Advocacy Week, we have come to appreciate many of the suggestions and recommendations you had for our organization.

Many of these recommendations have been highlighted by other member associations, and by members of our Board. Though CASA can count numerous successes in the past years, like you, we continue to strive to strengthen CASA's effectiveness. The areas highlighted in our discussion are central to CASA accomplishing its goals of ensuring Canada has an education system that is innovative, accessible, affordable, and of the highest quality. Therefore when developing a plan forward, we as a Board must ensure that the solutions proposed meet the needs of CASA's entire membership. Our Board can commit to some actions, however, CASA's membership, as a whole must have final say.

CASA's policy process, and the fashion in which CASA presents and formats policy, has been a point of discussion for many years. As you laid out, other models exist which have proven particularly effective for student advocacy, and we have tasked CASA's home office staff with developing an evaluation of, and potential implementation process for, thematically organized policy papers akin to those used by others. An initial proposal of this plan can be found in Appendix A of this letter. We will continue to further develop the plan in order to strengthen CASA's policy process while also addressing this issue. Once finalized we will share it with you in order to elicit feedback in advance of a potential presentation to CASA's membership at AGM.

On the question of the clarity of roles between the general membership and the Board of Directors, the CASA Board understands some of the ambiguity that arises when a Director or Officer are assigned roles such as "Communications, Policy and Research, Advocacy or Membership". First and foremost as a Board we are committed to our fiduciary duties to CASA. These roles are clearly outlined in CASA's bylaws and the Canada not-for-profit corporations act. These duties will always remain foundational to the role Directors and Officers play in overseeing the organization. As for additional responsibilities assigned to CASA's Directors and Officers, we believe it is neither responsible nor incumbent on us to enshrine the current additional roles and responsibilities the Board has taken on. We believe what

works for the current Board may differ for the next. For example, the Board may wish to assign a Director to be involved in any 2015 election campaign that CASA's membership chooses to endeavour on. To add a fundamental responsibility such as having the Board be responsible for priority selection would ultimately be a decision made by the membership as a whole.

As a Board we commit to ensuring that during CASA foundations, in conjunction with home office, clearly articulate the various roles and responsibilities that go along with serving as a CASA Director or Officer. Further, in our transition report to the newly elected Board we will make a recommendation that, should they choose adopt additional responsibilities, these are clearly articulated in job descriptions for the membership.

Finally, on the question of the selection of advocacy priorities, the Board acknowledges many of your concerns. Many priorities were selected this year, and in a fashion which may have hindered the construction of a coherent plan for post-secondary education in Canada. CASA's Board has requested that staff produce an outline of options for priority selection to accompany the policy-formatting document so as to ensure that the priority selection process complements CASA's policy development. Striking a balance between a fully member run process and one adaptive enough to take advantage of political opportunities is a delicate one, and we will be reviewing possibilities on how to navigate it.

Your four organizations have played a critical role in developing and strengthening CASA for many years. As CASA's Board we thank you for continuing this trend by providing us with well-thought out recommendations. We ask that each of your associations continue to actively engage with the membership and ourselves in general to begin to address our shared concerns. This process will take some time and will require sizable efforts from CASA's membership and staff, and all we ask is that you and your organizations continue to remain engaged to make CASA stronger.

Regards,

The Board of Directors

APPENDIX IV: FEEDBACK

FROM STANDING COMMITTEE ON PROV AND FED AFFAIRS:

Question 1 - What should the USC and Western students expect from federal representation?

- Direct involvement on behalf of the government to solve issues of student debt and jobs
- The USC should **not expect much** from federal representation because they may not have the power to do much as their policies tend to be not directly applicable to the day to day lives of students.
- A meaningful and **strong stand on tuition issues.**
- The USC and Western students should expect the federal representation to **be aware of the needs and concerns of students** through research and outreach and to **advocate on their behalf to improve post-secondary education** in Canada.
- Fair and accurate representation that is based on **active, current student research** (ie. surveys, forums, round tables, etc.) and responsive to changing opinions and current events.
- An effective, organized, and **impactful federal lobbying body that has well-developed relationships** with both MPs and public servants in Ottawa.

Question 2 - What do you think the three most important federal-related issues are for students?

- Student debt Student Tuition Jobs
- **Tuition Fees / general money issue** - taxes Healthcare International relations
- **More funding**, pure and simple. Universities are being starved for cash and that leads to lower education quality.
- Student loans/ **accessibility/ affordability** - Institutional Quality - Lack of funding, bursaries, and scholarships
- **Quality of education** (specifically, quality and clarity of information taught by professors whose first language is not English) 2. **Accessibility of additional funding** (ie. scholarships, grants, and bursaries) 3. **Accessibility and awareness of mental health services** provided on campus and by the government.
- Student In-study employment penalty on loans, Mental Health Services for PSE students, Post-grad employment opportunities for students

Question 3 - What factors are important in federal representation and why? (For example, advocacy, research, partnership with other stakeholders etc.)

- **Research** coupled with providing **students positions** in said research fields
- **partnerships** with stakeholders is vital as they can result in direct and immediate benefits for students.
- **Research** is important, but only if it leads to strong and meaningful advocacy. Half-measures often lead to the stronger side (i.e. government) taking the whole.
- It is important that the federal representation conducts **research** and **hears the opinions of students** in order to make improvements in the system. To advocate for the students the federal representation must be aware of the concerns and ideas that students have and this comes from research and outreach. They need to remain aware of the needs and concerns of all students.
- Quality **research** to ensure accurate representation 2. **Accessible outlets for student advocacy** so that voices can be heard and representative change can take place 3. **Timely action** so that current/unexpected issues can be addressed to benefit all staff and students
- Ensuring that PSE students in Canada have a **unified voice** and have **a seat at the table** during policy discussions. Making sure that federal parties recognize that they need to take into consideration the **needs on PSE students**. Cultivating **relationships with other lobby groups** in order to find areas of mutual advocacy for enhanced lobbying power.

Question 4 - Choose between the following two voting models, identifying the preferred model, in your opinion.

- One School One Vote – 16.7% (1)
- Proportional Representation – 83.3% (5)

4. Choose between the following two voting models, identifying the preferred model, in your opinion. [Create Chart](#) [Download](#)

	Response Percent	Response Count
<p>One-School-One-Vote: In this system, Western (population of 31 000) is 1/10th of the membership size of the organization (represents 1/10th of the students in CASA). It holds 1/26th of the vote. As a result, Western has the same voting power as schools with 3000 students or less, except for certain 'special resolutions.'</p> 	16.7%	1
<p>Proportional Representation: In this system, Western (population 31 000) represents 1/10th of students in CASA, and therefore has 1/10th of the vote. This is the model used by OUSA, and legislatures across Canada.</p> 	83.3%	5
	answered question	6
	skipped question	0

Question 5 - Over the past 5 years, what value do you perceive that Western students have received by being a member of CASA?

- Helping voice western students needs and concerns to the federal government
- **Not much.** CASA has not been too beneficial for Western students
- I perceive **very little benefit.** We're not tied up in legal battles, but we're also not getting anything meaningful in terms of tuition advocacy.
- I have been a student at Western for under one year so I cannot speak to the value that Western students have received by being a member of CASA. (not immediate)
- **Access** to more opinions and change-makers than would otherwise be privy to, providing them with a variety of viewpoints and vehicles to make change.
- CASA provides Western students with a **federal advocacy presence** in order to work with the government on issues such as the National Student Loans Program. However, as far as the perception of CASA goes, **there isn't much that has been seen by students**, as CASA does not do the best it can with regard to a **presence** on campus. Moreover, the nature of CASA as a group representing so many schools results in smaller schools getting a disproportional amount of representation compared to schools like Western.

Question 6 - Please rate CASA's presence on campus, in your perception

- Way below average - 50%
- Below average – 33.3%
- Average – 16.7%

6. Please rate CASA's presence on campus, in your perception.		Create Chart	Download
		Response Percent	Response Count
Way below average		50.0%	3
Below average		33.3%	2
Average		16.7%	1
Above average		0.0%	0
Way above average		0.0%	0
		answered question	6
		skipped question	0

Question 7 - What responsibilities should CASA have, to its members?

- **Lobbying students needs** to the government and its representatives, as well as attempting to **lower university costs** to make it more available to students. As well helping to ensure that **jobs** are available for graduates
- to **represent** them and ensure that they are satisfied
- To **represent** them effectively and not fall into the trap of **playing ball** with the boys and girls on the hill.
- CASA should be responsible for being the **national voice** for post-secondary students in Canada. They are responsible for **advocating** on behalf of students and to provide the government with solutions when they are making decisions regarding post-secondary education.
- To actively gather information, to use this information to accurately **represent** students, and to actively **report back** to the student body on progresses made.
- CASA should be responsible for making an **honest effort with regard to collecting feedback** from it's constituents in order to properly represent them. Additionally, CASA needs to be **accountable for it's shortcomings** by providing honest reports on it's progress and challenges, as well as publishing it's audits to ensure that it is being financially responsible.

Question 8 - What characteristics of CASA are positive?

- Its **direct involvement with the government and universities**
- the idea of **representing** undergraduate students on a federal platform
- The **small steps approach** often gets things done, even if those things aren't necessarily huge.
- CASA's beliefs on accessibility, affordability, innovation, and quality are valuable. Their **mission**, vision and values are all very well structured and reflect their want to empower both students and decision makers.
- Focus on **student fees**, facilitation of communication between constituencies
- CASA does the best it can to be inclusive of all schools no matter their size. If we want to provide Canadian PSE students with a voice in Ottawa, even the smallest schools must be represented.

Question 9 - What characteristics of CASA concern you? Do you believe these concerns could be rectified within CASA?

- Don't know enough to comment
- the **underrepresentation** and the **lack of transparency** and awareness concern me. yes these concerns can be rectified but it would involve a major overhaul of CASA.
- **Too moderate**, too willing to play ball.
- Because CASA represents such a large number of students who come from very diverse areas, cultures, and backgrounds I believe that a valid concern is **wether they can lobby on a national level. I see greater value in an organization that work with the provincial government** to better the education system because it focuses on a specific area. I think CASA is a very valuable organization but as we have seen recently in the news, provinces can vary immensely in their values and customs.
- **Timeliness** of reports/actions
- The main challenge with CASA is it's ability to represent a varying and diverse array of interests from schools across Canada. Moreover, the degree to which CASA can **balance the organizational capacity of member schools** is a concern that would be difficult to rectify within the organization itself.

GENERAL SURVEY TO STUDENTS-AT-LARGE – 29 responses

Question 1

Please rate how well you know CASA			
		Response Percent	Response Count
Way below average		48.3%	14
Below average		24.1%	7
Average		17.2%	5
Above average		3.4%	1
Way above average		6.9%	2
answered question			29
skipped question			0

Question 2 – What should the USC & Western students expect to receive from federal representation?

Main expectations – Student representation and for student ideas to be heard

- No Idea or haven't heard about it before (7 responses)
- Representation & Advocacy- Equal Representation, Concerns of students heard at federal level, Advocacy at the federal level that leads to results, Advocate for students, Acknowledgment, Better recognition and representation (6)
- laws to limit tuition costs, A voice in the government regarding concerns about the cost of tuition that CONTINUES to rise, Financial support, Money, Government Grants, More scholarships, tuition decreases, (6)
- Improve life at school - More attention focused on issues in the school system, or specifically at Western, lobbying for changes that better student life policy wise (2)

Other expectations

- Guidance on how the government works and how to get involved

- Accommodation in which students are in favour
- Thought Leader on federal issues, effective & timely advocacy
- job assistance
- experimental learning support
- Stances on major issues facing CDN universities
- Support for student governments
- Sharing best practices/advocating to administrations
- support on how federal policies can affect the education system and how risks can be mitigated
- more information
- Better support from the government with respect to health and future careers.
- Better rates on services [at university],
- a better Repayment Assistance Plan for OSAP, and also it would be nice if all internship programs are paid.
- Help to form guidelines of expectations for post-secondary education for all schools, as well as regional guidelines for what the students, faculty, university members and government are responsible for.

Question 3 - What are three issues related to your post-secondary education that are most important to you? (i.e. university tuition, government grants, cost of textbooks and copyrighted material etc.)

Key Words – Government Grants, Financial Assistance, University Tuition

- University tuition (**23 responses**)
 - The lowering of tuition costs by government subsidy and direct payments. ie. The government should be paying for our schooling like they do in Europe.
- Textbook Costs (**20 responses**)
 - Concerns
 - Textbook editions always changing making it a great burden
 - “Lowering the cost of textbooks. We should be able to get them at the teacher rate/pricing. \$200 for a book I will use for a year and then sell is unacceptable.”
- Government grants, loans & scholarship(13 responses)
- Jobs, (3)
 - “ease of finding a full time job after graduation”

- Lack of valuable employment
- Copyrighted material (3)
- Disability Issues - Disability representation, accommodations universities offer students with any disabilities (2)
- Financial assistance (2 responses)
- Access to academic journals (2 response)
- Course load (1)
- Online learning
- wide variety of courses that are up-to-date and still relevant in the workplace
- Quality of faculty
- Poor use of funds (inviting celebrities to give lectures for mere entertainment value, and at tens of thousands of dollars)
- abysmal communication with/to USC representation, and no real possibility for students to hold them accountable after voting day.
- Cost of meal plans
- Reliable service and academics
- Networking
- Costs of daily product (?)
- Creation of a credit transfer system between Canadian Universities and Colleges that makes it easier for students and that rewards instead of penalizes them for changing their minds and trying to pursue what they really want.
- program availability (number of spots available),

Question 4

USC Survey on Canadian Alliance of Student Associations Representation



Choose between the following two voting models, identifying the preferred model, in your opinion.

	Response Percent	Response Count
<p>One-School-One-Vote: In this system, Western (population of 31 000) is 1/10th of the membership size of the organization (represents 1/10th of the students in CASA). When it comes to voting power, it holds 1/26th of the vote. As a result, Western has the same voting power as schools with 3000 students or less, except for certain 'special resolutions.'</p> 	10.3%	3
<p>Proportional Representation: In this system, Western (population 31,000) represents 1/10th of students in CASA, and therefore has 1/10th of the vote. This is the model used by OUSA, and legislatures across Canada.</p> 	89.7%	26
	answered question	29
	skipped question	0

Question 5

USC Survey on Canadian Alliance of Student Associations Representation



Please rate CASA's presence on campus, in your perception.

		Response Percent	Response Count
Way below average		41.4%	12
Below average		51.7%	15
Above		3.4%	1
Above average		0.0%	0
Way above average		3.4%	1
answered question			29
skipped question			0