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Board Transition in a Student Government Organization:

Developing Effective Organizational Change

BY

Rolando Eduardo Inzunza

Bachelor of Arts with Honours, Saint Mary's University, 1996

THESIS

Submitted to the Department of Psychology
in partial fulfillment of the requirements
for the Master of Arts degree
Wilfrid Laurier University
1999

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Acknowledgements

Dad
I love you more than words can ever say. You have motivated me to become more than I ever thought I could, and here I am. I dedicate this work to you.

Richard
Thank you for your unbelievable amount of patience, your phenomenal commitment, and of course for your unfailing humour. You guided and supported me through one of the most challenging journeys of my life and have helped me to become a better person.

Jennifer
I am sorry this took so long. Being here was two of the hardest years of my life. We never doubted that this was possible and now we have the rest of our lives. Your love has meant so much to me, and that is why everyday I am thankful for you.

Mom
Your support and love has meant a lot to me. You have helped me to understand who I am and why.

Granny, Andrew, Nisa, Nancy, Adam, Suzanne, Ben, & Glenn. Every moment you have given me has been a gift leading me to where I am.

To the close friends I made having participated in this program, Stephanie, James, Jody Lee, Shannon, and Isaac. We have given so much to each other. Your honesty, support, and intellect are only a few of your best qualities but some of the ones I loved the most. It never ceases to amaze me how gifted you all are. Your openness, your compassion, and your brilliance I have always admired from afar. So many times when we were together you made me laugh, you brought so much of yourselves into my life. Thank you.

To this day I am surprised the old professor didn't fall asleep reading the following pages countless times.

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Abstract

I focused the research project on creating effective board transition in a graduate student government organization of which I was the president in 1998-1997. I conducted the evaluation as an insider, using a participatory-action research model. My search of the literature focused on principles of community psychology and how the literature on learning organizations could apply these principles as organizational goals. I then used organizational development as a model for putting these principles and subsequent goals into practice. I guided the evaluation and improvement of board transition with measures of board effectiveness. I collected the data from in-depth qualitative interviews with the ten other board members of the graduate students' association board. I also obtained information from contact with various student government organizations across the country about their processes of board transition.

My findings revealed four major themes of board transition: uncertainty about the official and operational goals, a lack of "big picture" perspective, the necessity of transferring information, and an appreciation of the potential learning experience. To enrich the context for this study I also included my personal comments on my experiences as an insider evaluator. In the discussion I bridged my conceptual framework with the findings of the study. I conclude with recommendations as action-oriented statements to improve effectiveness of the board transition.

BOARD TRANSITION IN A STUDENT GOVERNMENT ORGANIZATION:

DEVELOPING EFFECTIVE CHANGE

INTRODUCTION

<u>The Issue</u>

As the president of the Wilfrid Laurier University Graduate Students' Association (GSA) I have a strong personal interest in developing and maintaining the board of director's (BOD) growth as a team. My thesis project developed effective mechanisms to alleviate the stress of the transition each year between the old and new BOD. Studying the GSA, I examined what mechanisms previously existed to assist the process of transition, and what mechanisms, if any, needed to be re-structured or created to develop a more effective transition process. I did not evaluate the performance of the board or of individual members but rather offered mechanisms to support individual contributions to the GSA and the transferring of knowledge and experience to subsequent BODs.

I have been involved with the GSA for two years. In my first year with the GSA I held a member-at-large position on the BOD. I started in September 1997 when I first came to Laurier. However, the BOD members had already been functioning in their terms since May 1997. My orientation was a "trial by fire." There was little introduction to the GSA other than attending the BOD meetings and being familiar with the

other members. This past year I had the advantage of previous experience and heightened understanding of the roles of each BOD position and the university community. However, for the current GSA BOD members their roles and expectations as BOD members were not clearly outlined by the previous board.

This year the GSA had a number of team building sessions. The BOD, to create a more effective GSA, identified two major issues as needing further attention. The first issue was "increasing graduate student involvement" and the second was "creating a more effective transition process for the incoming BOD." The latter issue, through a consensus decision of the BOD, became the priority of the GSA and affirmed my interest in studying effective board transition.

As an aspiring community psychologist, I am interested in helping organizations develop their resources to become more effective in serving their community. As the GSA president, I aspired to provide board members with an environment supporting the learning of new skills and development of old ones, for both their personal and the GSA's benefit.

Due to the academic and career responsibilities of many graduate students there continues to be a high turnover of BOD volunteers. Each year a new group of BOD volunteers need to get acquainted with the GSA environment. This orientation process has taken the form of a series of activities. For the last two years the president has initiated this orientation focusing on team development, role definition, and

familiarization with the culture of the organization and the university environment. As a result of a lack of documentation, this orientation has developed without the benefit of the previous BOD experience and forced each BOD to "re-invent the wheel." Subsequently, each year's board loses much time and energy grounding and orienting themselves to their duties. I feel a deeper knowledge of how to foster an effective transition, in line with the principles of community psychology (CP), would be useful for the GSA.

The GSA began at Laurier in 1985. The mandate has always been to serve the various needs of graduate students on campus. The GSA is one of two student government organizations on campus officially recognized as representing constituent student bodies. The GSA provides assistance to graduate students who need a bursary, have attended a conference and are seeking reimbursement, conduct research external to the campus, hold special events, seek employment opportunities or supplementary medical insurance. The Grad House is a newly constructed building on campus operated by the GSA. At the Grad House, the GSA offers facilities such as a computer lab, a boardroom, a game room, outdoor patios, and a pub. In the Grad House the GSA offers a number of social events and opportunities to strengthen the cohesiveness of the academic community, and makes the building available for private bookings to campus student, staff, and faculty groups.

Currently the BOD for the GSA is composed of eleven directors: four executive directors, five directors/coordinators, and two members at large. The GSA BOD experiences a high rate of turnover annually, simply due to the fact that we are comprised of graduate student volunteers, most of whom are on campus for one to two years before graduating.

The GSA BOD strives to build a consensual decision-making process. Although the official policy of the BOD is that decisions are made by a simple majority of members supporting a resolution, the spirit of the BOD is to work towards having most decisions supported by the whole group.

In order to assist me with the research project, a steering committee was established. The steering committee was comprised of 3 BOD members who volunteered to participate in the research project by: designing the study; providing feedback; and implementing an action plan utilizing our findings.

Background

My thesis project began as a personal interest in balancing the beliefs and values of community psychology with the principles of learning organizations. As a facilitator and leader of various groups, I have been absorbed many times in the challenges and rewards of working with groups to develop both process and goals. In May 1998, I was introduced to the field of organizational development, specifically

"learning organizations," and I recognized that a learning organization applies, ideologically and practically, an implicit framework for implementing and developing the principles of community psychology (Senge, Kleiner, Roberts, Ross, & Smith, 1994; Watkins & Marsick, 1993). I appreciated the smooth fit between the field in which I was being educated, community psychology, and another type of applied behavioral science, learning organizations.

In a learning organization it is necessary for a group to be capable of learning on the job the environment or specific situations. A learning organization must be able to adapt to an ever-changing environment while maintaining identity and developing an action plan for the future (Senge, 1990). In my opinion, learning organizations espouse principles similar to those in community psychology: an ecological perspective, capacity building, and empowerment. I included the concept of a learning organization in my thesis as a map for applying community psychology to the organizational development (OD) of the GSA.

To begin examining mechanisms for the transition process, I will first discuss three core values of community psychology: an ecological perspective, empowerment, and capacity building. After illustrating these values, I will define my key assumptions about what characterizes an ideal organization. In my experience the ideal working/learning environment encourages mutual growth, respect, and open communication. In an ideal working environment there exists an

appreciation that all parties involved have something to contribute as well as something to learn from the group process.

Following this step, I explore the characteristics of a learning organization. I hope that by linking community psychology and learning organizations I can aid the GSA to develop an effective group environment. The literature on learning organizations, as I explain further in the thesis, reveals how to enlighten, develop, and sustain an environment in line with the principles of community psychology. In the final part of the literature review, I ground concepts explored within both sections on community psychology and learning organizations in the literature on OD as a means of exploring effective board transition.

CONCEPTUAL FRAMEWORK

There are four aspects to my Conceptual Framework: Principles of Community Psychology, Defining a Learning Organization, Organizational Development, and Making the Link. In the first sub-section I highlight three principles of community psychology: an ecological perspective, capacity building, and empowerment. Secondly, I define the general components that form a learning organization. In the third sub-section I review the literature on OD with an emphasis on board transformation. Finally, I make the link between the preceding three sub-sections, emphasizing the interconnectedness of the values espoused within community psychology, learning organizations, and OD. Figure 1 (see p. 10) illustrates the relationship among the disciplines of

community psychology, learning organizations, and organizational development.

Figure 1: Conceptual Framework
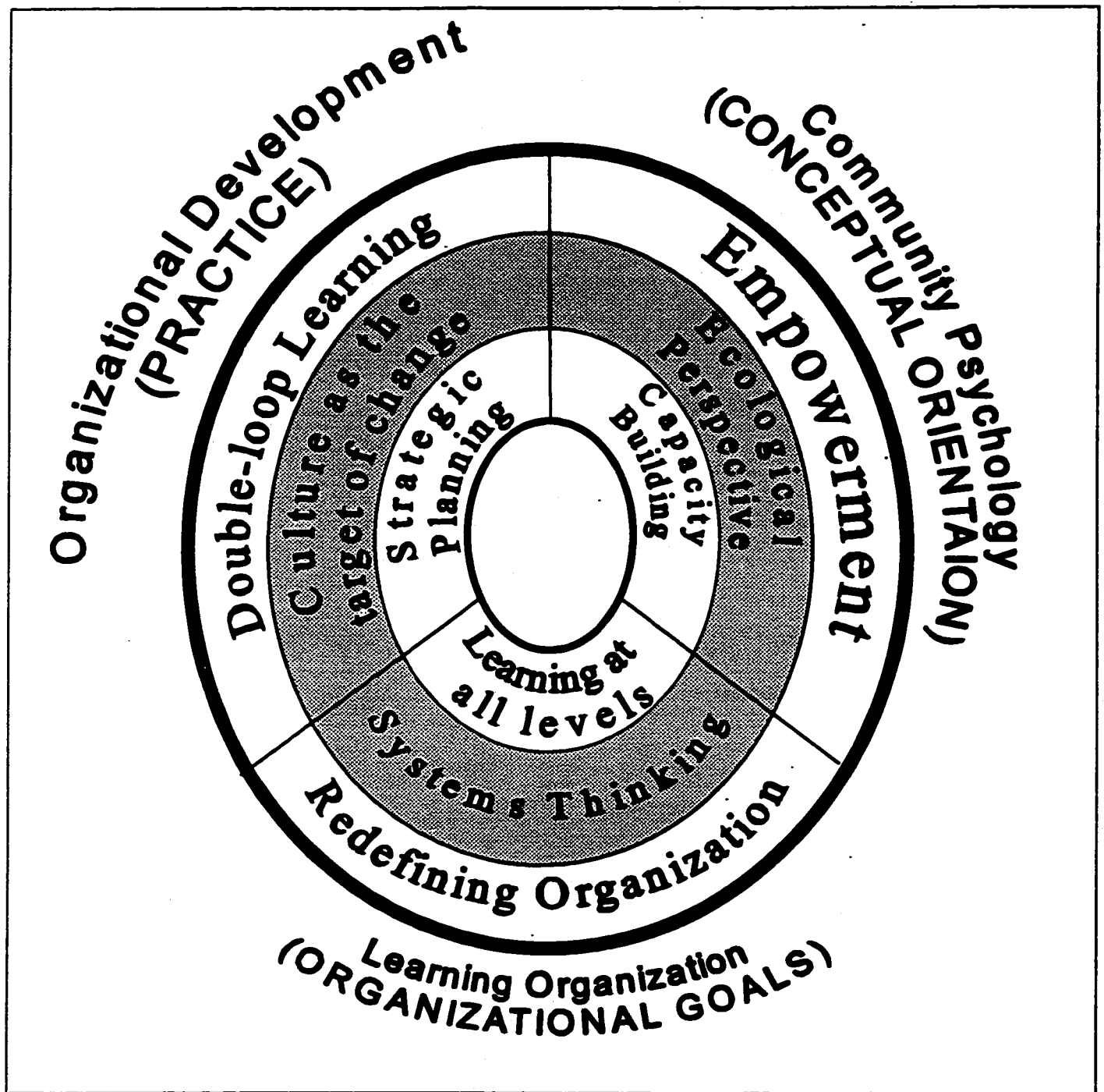
Principles of Community Psychology

My connection to community psychology influenced my approach to studying the transition of the GSA BOD. My values affected my perspective about the issue, what questions I asked, how I collected and analyzed information. Community psychology was also the source of my desire to use the findings in a beneficial way, not only for my own knowledge but also for the people involved, the BOD.

Although community psychology encompasses many social justice principles, for the purpose of exploring board transition I examined only three concepts as the framework for my investigation: an ecological perspective, capacity building, and empowerment. These three concepts are the most appropriate for my thesis because, ideologically, they describe my assumptions about what builds healthy group process.

An ecological perspective. One of the central attributes of community psychology is an emphasis on an ecological perspective, or as Levine and Perkins (1997) put it, "the study of the fit between persons and environments" (p. 4). This concept examines the individual in relation to the environment; a person can influence and be influenced by factors within the individual's situation. Therefore, the conceptualization of an issue must involve an understanding of various factors related to the issue at the macro, meso, and micro levels. For example, consider an intervention aimed at reducing the number of cases of sexually transmitted diseases in youth. Organizers of an intervention, to be most

effective, need to be appreciative of factors ranging from an individual's behaviour (micro) to the behaviour of peers (meso) to an acknowledgement of the cultural biases on the issue (macro), that is, societal attitudes towards sexual promiscuity. An intervention, to effectively address an issue, must consider the frameworks existing from the systemic level through to the personal.

Kelly (1966) identified four principles that support the ecological metaphor: *interdependence, cycling of resources, adaptation,* and *succession.* The *principle of interdependence* dictates that the unit of analysis in an intervention must be the community, because change in any ingredient of a system produces change in other elements of that same system. For example, changing the amount of sugar in a cake recipe mutually influences other ingredients and drastically alters the final product. Mutual influence refers to an environment where there exists the opportunity for individual group members to communicate ideas and subsequently affect one another. The principle of *cycling of resources* refers to an understanding of the community's resources. An intervention assesses how resources are acquired, improved, and utilized, and to what extent this process matches the community's need. The *principle of adaptation* pertains to how a community alters its behaviour, or fails to alter its behaviour, in accordance with changing resources. Finally, in the *principle of succession* we acknowledge the fluidity of a setting. Any environment is constantly changing; therefore,

in order to devise a truly enduring intervention, the community along with the "trained" interventionists need to asses the resources of the community. Having assessed the community and its strengths, an intervention must competently equip people with the skills and knowledge to prepare themselves for the unfolding future, the focus of succession.

Capacity building. Psychological analysis has traditionally focused on weaknesses and problems within the individual. With the development of community psychology, values emphasizing strengths and capacities of a community have been instituted. In community psychology an intervention is based on identifying strengths of a community. White (1959) wrote about competence, by which he meant a sense of mastery when interacting with the environment. Capacity-, strengths-, or competence- building refers to an intervention actualized on the abilities of a community, that is, developing or improving existing resources to fit the need(s) of a community.

Trickett and Birman (1989) assert that resources can "assume a variety of forms, including *persons* whose knowledge or skills are relevant to dealing with a particular issue" (p. 364). An intervention, from a community psychology perspective, should be based on developing or adapting the resources that exist in the community in order to provide a long-term sustainable solution. As Levine and Perkins (1997) affirm, "one should strive to understand the nature of the resources and how a

community cycles its resources... to introduce a change that will endure and continue to help resolve problems in a particular setting" (p. 146).

Creating an intervention with a community, based on their strengths and capacities, serves to create a solution specific to the needs of the environment and empowers community members to take a critical part in building their own community resolution. This was the intention of my thesis: developing effective board transition in a student government organization.

Empowerment. Sensitivity to issues of capacity building and an ecological perspective are the basis for creating a project responsible to the community. Such a socially motivated project works with people, empowering each individual to achieve their full potential as a community member.

According to Duffy and Wong (1996), the concept of empowerment emphasizes two interrelated principles, *independence* and *interdependence*. These two principles illustrate the process of power re-distribution. *Interdependence*, as articulated by Kelly (1996), acknowledges the mutual dependence of community members working together, building a sense of community. *Independence* refers to the process of strengthening with people their own potential to actively control their personal lives.

Empowerment refers not only to the capacity for self-determination but also to the ability to alter an unequal power distribution. From the

community psychology perspective, working to empower means questioning the assumptions and values that govern the structure of an organization. An intervention that fails to re-distribute power is futile: it serves only to uphold the status quo and does not create or support change. For example, if an intervention in an organization were only to empower certain teams to accomplish certain goals, the results would be short-lived. The teams might feel a sense of empowerment but this would only be temporary. Without the attempt to re-structure the power distribution of the whole organization, as soon as the goal had been reached, the employees would have no choice but to be re-integrated into the original and disempowering organization.

Defining a Learning Organization

Throughout the literature, a learning organization is defined by a number of key components. A learning organization continuously emphasizes: (1) learning at various levels throughout the organization; (2) adapting to a changing environment; (3) redefining organizational structure, culture and perceptions; and (4) engaging in systems-wide thinking (Senge, 1990; Swieringa & Wierdsma, 1992; Watkins & Marsick, 1993). *Continual learning* implies that people, throughout the organization, frequently contribute to problem solving about issues they face or anticipate facing. The *capacity to adapt* illustrates a willingness to experiment, rather than being stagnant or content with a solution. The continual process of *redefining organizational structure, culture, and*

perceptions elicits a desire within the organization to question assumptions and beliefs in order to better understand the group, their environment, and the group process (Staniforth, 1994). The goal of redefining these *mental models*, as Senge (1993) calls them, is to continually be creating and reflecting on ideas. Finally, in the execution of organizational change a *systems thinking* approach recognizes that the many separate and small aspects of an organization can influence and determine what the whole structure learns and how it behaves (Swieringa & Wierdsma, 1992; Watkins & Marsick, 1993).

To study the framework of learning organizations I outlined how these four components (*continual learning, capacity to adapt, redefining organizational structure, culture and perceptions,* and *systems thinking*) are considered throughout the process of developing and sustaining an ideal group. (For more information on putting these components into practice refer to Senge, Kleiner, Roberts, Ross, & Smith, 1994.) As I will discuss in the section Making the Link, the practice of learning organizations embodies the values and beliefs of community psychology and provides a structure for applying these principles in a concrete plan.

A learning organization is group-centered and balances the process of working to build an ideal team focused on the goals determined by the team. A key aspect of developing and sustaining the four components of a learning organization is leadership. The style of leadership within an

*

organization has the ability to influence the development and sustainability of a team-centered approach.

In a learning organization one method of fostering *continual learning* is through shared leadership, that is, people taking the lead in areas in which they are knowledgeable and confident or want to learn more about. Senge (1990) states the uniqueness of a leader's role in the learning environment as, "responsible for *building organizations* where people are continually expanding their capabilities to shape their future – that is, leaders are responsible for learning" (p. 9).

Leaders in learning organizations strive to enable others to lead collaboratively. Each successful leader is distinguished not so much by a set of technical skills as by the ability to learn and adapt to the fluctuating demands of the organization. Continual learning and success require exploring new opportunities and learning from past successes and failures.

Also greatly dependent on the style of leadership is an organization's *capacity to adapt.* If a leader encourages opportunities for people to reflect, adapt, decide, and respond to recent events, then learning becomes a continual cycle (Senge et al., 1994). By regularly reassessing the vision, goal, and direction of the group an organization is engaged in adaptation. Dimock (1987) summarizes the function of group leaders as (1) helping the group to achieve a specific goal and (2) helping to maintain or build the group itself. Identifying a common task

with the group and outlining/brainstorming how the team can work towards this goal are important steps to be frequently revisited. Leaders keep the group focused to help accomplish their goal(s) effectively. In helping to build the group, a leader may strive to recognize personal strengths of each individual and attempt to distinguish where that person can be most productive and creative.

Closely related to an organization's capacity to adapt is the group's continual *redefining organizational structure, culture, and perceptions*. As described by Johnson and Johnson (1997), an effective leader tries to:

Challenge the status quo of the traditional competitive, individualistic organization.... Lead by example by (a) using a cooperative team procedure and (b) taking risks in increasing expertise.... Encourage members to persist and keep striving to improve their technical and interpersonal expertise. (p. 208)

By trying to proactively adapt to circumstances and provide means for continual group learning and contributions, members of a learning organization are constantly questioning the status quo. Developing organizational change, as Senge et al. (1994) explain, requires examining the underlying assumptions of why "rules, physical structure, and work processes take their current form" (p. 93).

Challenging and addressing our assumptions about values, goals, and beliefs creates a constant balance between process and outcome.

Regularly revisiting the goals, mission, and assumptions as defined by the group enables the organization to accomplish objectives and address the needs of the individual members and the group. Redding and Catalanello (1994) state that a learning organization advocates against accepting the status quo without questioning it. Simultaneous attention to team building (process) and the goals of the group and individuals (outcome) creates a productive and satisfying learning environment reflecting effective group process. Whether the group decides to address the two issues separately or together, it is working towards and aware of both concurrently.

The process of *systems thinking* involves gaining a full appreciation of the factors affecting the direction of a learning organization. Today, many theorists view organizations as an organic structure, much like the human body (Alie and Seita, 1997; Watkins and Marsick, 1993). When there is a force exerted on one part of the organism, the effects are felt throughout.

By using a learning organization to illustrate the development and goals of an ideal group environment, I identified what characteristics of group dynamics needed to be emphasized in order to evaluate board transition at the GSA. Part of creating an effective board transition is understanding what makes an effective board and for this I turn to the literature on OD.

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Board effectiveness. One can try to assess board effectiveness by measuring the extent to which the board succeeds in accomplishing its mission. However, Herman and Renz (1998) state that measuring effectiveness has long been a debated topic, and results or analysis can be affected by the nature of the specific organization studied. For example, because a nonprofit organization is created to provide services to a community, it would be more accurate to measure success and effectiveness by how well the organization provides its services rather than solely by financial performance (Green & Griesinger, 1996). However, how well an organization accomplishes its mission (e.g., reducing youth violence) can be quite difficult to accurately assess (Herman & Renz, 1998; Green & Griesinger, 1996).

Measurements of board effectiveness are subjective and differ among non-profit organizations. As Herman and Renz (1998) affirm, effectiveness "is a set of judgements by various stakeholders" (p. 27). Green and Griesinger (1996) suggest that to adequately define an organization's effectiveness one should critique the quality and sustainability of needed services. With respect to GSA transition, quality and long-term sustainability of needed services require the transferring of information from one BOD to another.

Smith and Shen (1996) examined factors characterizing effective nonprofit organizations. In their study, leaders of volunteer nonprofit organizations (VNPO) could increase the BOD's perception of

effectiveness by being attentive to a few factors. Some factors that increase the VNPOs effectiveness are if it serves, to some extent, the general public instead of an exclusive membership. Formalizing the structure and operations of a VNPO is also indicative of a competent BOD, for example, having by-laws, developing a mission statement, and operating formally. To build the formality of a VNPO one might include officers in the governance of the structure (i.e., president, vice presidents, secretary, and chair) who are familiar with the by-laws, and also include a committee structure with active members. The three strongest predictors of board effectiveness are "having by-laws available... having many active committee members... and having a regularly revised, board-created, formal mission statement" (Smith & Shen, 1996, p. 283).

Green and Griesinger (1996) upon review of the OD literature identified certain activities for effective nonprofit boards:

(1) determining or setting the organization's mission, purpose, and policies; (2) strategic planning; (3) determining or evaluating the organization's programs and services; (4) board development; (5) selecting, evaluating, and terminating the CEO; (6) ensuring adequate resources, including fund development; (7) financial management (operating budget); (8) interaction with the community; and (9) serving as a court of appeal for the resolution of disputes involving staff, clients, or both. (p. 386)

These activities complement the findings of Brudney and Murray (1998) who state the most common reasons for organizational change are "the dissatisfaction with the board's role and responsibilities, committee structure, relationships with management, and meeting dynamics" (p. 345).

Coates (1997) asserts that the field of OD has evolved to include "a focus on culture as the target of change, [and] a focus on the long-term nature of the change process" (p. 158). As Argyris and Schön (1978) state, "there is nothing more problematic than solutions" (p. 8). Preferable to simple solutions is an organizational dialectic creating "continual transaction with their internal and external environments which are continually changing both as a result of forces external to the organization, and as a result of the organizational responses to their situations" (Argyris & Schön, 1978, p. 42). Based on these types of arguments, the field of OD endeavored to implement tools providing members of an organization with the ability to continually readdress an issue. As Argyris (1993a) advocates, an organization needs to be able to conduct both single-loop and double-loop learning. Single-loop learning involves correcting errors by changing conventional behaviour, but double-loop learning emphasizes correcting errors through continual experimentation and feedback in an ongoing examination of the norms and assumptions an organization holds.

As well as including, in community psychology terms, systematic and sustainable change, OD uses the action-research model. This model is based on the continual cycling of information between the researcher and the participants. The initial data collection is followed by feedback to the group. Based on that feedback, the researcher changes the research focus or design to integrate the feedback received from the organization, then the cycle repeats itself. The method of involving participants in all the research stages creates a sense of organizational ownership of the process and of implementing action as a result of the research (This participatory action model is detailed in Part C: Research Objective and General Approach). As a result of using this research model, members begin to think about involving themselves in the strategic and operational decision-making process.

Strategic planning. Strategic planning has traditionally been viewed as the creation of a static long-term plan for operationalizing a vision or a mission of an organization (Porter, 1996). The concept of strategic planning has evolved to incorporate less of a concrete long-term commitment than a fluid and malleable long-term perspective. Carver (1997) states that strategic "long-range planning is not long-range *planning* itself, but exploration of vision. The board's job is to maintain and behaviorally demonstrate a long-range mentality" (p. 68).

Strategic planning must incorporate the culture of an organization into a long-range vision. This vision should highlight the resourcefulness

and capacity of people to learn and adjust to a constantly changing environment; the vision should highlight, in other words, organizational learning (Mintzberg, 1987). Coates (1997) explains:

> A strategic planning process emphasizes the importance of innovative approaches to identifying opportunities, by tapping the creative ideas of employees at all levels, elevates the mission statement from a collection of words to a vision, a powerful, emotionally as well as intellectually driven sense of purpose and direction. (p. 167)

A strategic planning process develops the mission and vision into actionable assertions providing purpose and direction by making clear the boundaries and priorities of an organization. Fry and Killing (1995) state, "The intention of strategy is to take the basic ideas... and express them in operational terms – in terms that are directly useful for analysis and action.. Strategy adds essential detail, establishes priorities and sets boundaries." (p. 20). Fry and Killing (1995) also state,

> Strategy represents a continuity of effort that can and will be changed, usually incrementally, to adapt to changing circumstances... the role of strategy is as an everyday tool that helps the general manager and the organization stay on track and put their efforts where it really counts for the business. Strategy helps to focus thought and action by setting priorities and boundaries. (p. 22)

Strategic planning has become less a plan of long-term commitment and more a tool for a long-term endeavor. Trusting the growth of the organization in the ability of people to adapt their priorities and assumptions can be a challenge for people not used to leading with empowerment as a goal. Strategic planning represents a blueprint outlining the process of how things are done and not specific solutions to all the "what if" scenarios.

Although my review of the literature did not yield information directly related to effective board transition, I obtained much information about evaluating the effectiveness of the BOD. Based on the literature and personal experience, I decided that my exploration of board transition should focus on defining roles and responsibilities, committee structures, and communication among board members. However, before I delve further into the specifics of my method I will create a conceptual link between community psychology, learning organizations, and organizational development.

Making the Link

My assumptions for the transition process of the GSA, the methodology for data collection, and my analysis were all based on the community psychology framework of an ecological perspective, capacity building, and empowerment. It was my hope that connecting community psychology principles, OD, and learning organizations would advance the development of a more effective transition program within the GSA.

My basis for writing and conducting a thesis was to gain experience and expertise in utilizing the principles of community psychology. I have tried to apply my commitment to these three values throughout my adult life and the activities I have involved myself in. A tremendous influence on my role as the president of the GSA has been practicing these values and trying to create a rewarding, learning experience for the BOD.

My interest in using the concept of a learning organization has enabled me to put my knowledge into practice and has served as a concrete tool to develop the operational goals of the GSA. In a learning organization, as in community psychology, one of the primary motives of change is to empower people to learn while building their capacities. Members are encouraged to challenge themselves and accomplish tasks for the group as well as work towards their own personal goals. The continual growth and change of the group, along with constantly reworking and revising its priorities to adapt to challenges of the future, characterize group fluidity and sustainability.

To me the community psychology term *ecological perspective* and the learning organizations term *systems thinking* are complementary. Systems thinking, as Senge et al. (1994) write, is "oriented towards looking at the interrelatedness of forces, and seeing them as part of a common process" (p. 89). Like the ecological perspective in community psychology, systems thinking is oriented practically towards having

people recognize the consequences, good or bad, of their decisions in the group. As Alie and Seita (1997) assert, "organizations, like biological organisms, require feedback to know how they are doing and to adjust behaviours accordingly" (p. 48).

The field of OD continuously strives to create a more effective group environment. OD practitioners have emerged as indirect advocates for the principles of community psychology (i.e. ecological perspective, capacity building, and empowerment), and learning organizations serve as a guide to applying these values.

To further explain the connections among the disciplines of community psychology, learning organizations, and organizational development I created Figure 1 (see p. 10). Here the common ties among each of the three disciplines, community psychology, learning organizations, and organizational development, are depicted. The model illustrates how the principles of the disciplines are like pieces constructing the whole.

With this diagram, each of the areas complements the others. The use of CP, LO, and OD, respectively, represent how a conceptual orientation can be applied to organizational goals and put into practice. Within each of the three disciplines I highlighted the three principles most important to me, as the insider evaluator of the GSA, to constantly have in mind.

Each one of the rings of the circle illustrates the commonalities amongst similar principles in the three disciplines. As shown in the middle ring of the circle, community psychology's ecological perspective is similar to systems thinking in learning organizations and culture as the target of change in organizational development. The outside ring illustrates the commonalities among community psychology's empowerment principle, redefining organization, and double-loop learning. The innermost circle shows the relationship among capacity-building, learning at all levels, and strategic planning.

Figure 1 (see p. 10) also depicts a building process from the inner-most circle to the middle ring of the circle and finally to the outer ring of the circle. That is, to build an effective organization from a learning organization perspective, an effort to facilitate learning at all levels must occur before systems thinking can be developed, which leads to the redefining of organizational assumptions and values.

RESEARCH OBJECTIVE AND GENERAL APPROACH

Purpose

To summarize, my interest in this project was to gain a greater understanding of what mechanisms could assist the BOD transition at the GSA and how these mechanisms could be re-structured or created to make the transition more effective. I conducted in-depth interviews of 10 board members, and from the data formed general themes of the experiences and interpretations, incorporating my own knowledge,

insights, values and beliefs grounded in the conceptual framework of community psychology.

The central strategy for conducting this thesis project was qualitative-naturalistic inquiry. Different approaches to conducting qualitative-naturalistic inquiry depend on the purpose of the research. The approaches vary in rationale and in emphasis. For this project, I worked from *a phenomenological, heuristic* approach.

The *phenomenological* approach focuses on investigating "what is the structure and the essence of experience of this phenomenon for these people?" (Patton 1990, p. 69). The goal of this research was to form descriptions of people's experiences and then organize this information for the GSA for future implementation in order to enhance the transition of future BODs. By focusing on people's experiences I attempted to access the interpretations of each individual's transition process into the GSA and each director's thoughts about what could have been done better.

In keeping with a *heuristic* approach, key components of my methodology were recognizing, appreciating, and incorporating my own experiences and insights about the entire project, as both the researcher and president of the GSA. According to Patton (1990), *heuristic inquiry* "legitimizes and places at the fore these personal experiences, reflections, and insights of the researcher" (p. 72). Part of including my own insights was to acknowledge how my experiences have played over the past years

two a role in shaping my interpretation of the development of the GSA. Patton (1990) states that often the event and the interpretation of the event are melded into one, so that the experience includes the event and a person's interpretation of what happened.

Participatory Action Research Model

In describing participatory action research, Nelson, Ochocka, Griffin, and Lord (1997) state that the process includes the responsibility of the researcher to provide ample opportunity for stakeholders to involve themselves. Stakeholders are volunteers who contribute as participants as well as co-researchers. In this case, I asked for volunteers to participate in the designing, collecting, verifying, and reporting of qualitative research. However, due to existing commitments of the steering committee members, to academic activities and to the GSA, they chose to participate by designing the study and the action plan subsequent to designating me responsible for collection, analysis, and verification of the data. This relationship was still empowering because, as Argyris (1993b) states, an investigator should,

> Seek research methods that empower participants to be genuine partners with researchers. A genuine partnership means that the researchers take on the responsibility for the technical features of the research; the participants and researchers jointly focus on the strategic goals of the researchers; and the participants are especially responsible

for implementing the research results in such a way that their validity is always tested in everyday life. (p. xi)

The participatory action model was based on my commitment to constantly look for and provide feedback. As the researcher, it was my intention to advocate for a process of creating meaningful findings that: (1) increased the participants' awareness of the issue and the context of their particular environment; and (2) would be applicable to the participants' setting. Nelson et al. (1997) assert,

> The desired process of participatory action research is one that is: democratic (enabling the participation of stakeholders), equitable (acknowledging people's equality of worth), liberating (providing freedom from oppressive conditions), and life enhancing (enabling the expression of people's full potential). (p. 7)

It was important for me to promote the study by making people aware of both the goals and the process of participatory action research. People felt connected to the findings because they had a direct, meaningful impact on the conclusions and future direction of the study. Participation rates were very high and BOD members' commitment to developing a sustainable solution and action plan was evident from the resulting impact the project had on the board, as I will describe in the Discussion.

METHODOLOGY

Sample

As indicated earlier, the steering committee decided that for the purpose of studying effective board transition, it was logical to use the current members of the GSA BOD as the sample. The BOD was composed of 11 directors: four executive directors, five directors/coordinators, and two members at large. Although the economic status of directors ranged from lower-middle class to upper-middle class, like most graduate students, most of them will realize a debt load of $15,000 – $60,000 upon graduation. The 1998-1999 BOD was mainly Caucasian people with two board members of West African descent. There were six males and five females volunteering on the BOD. Each year the BOD has had a turnover of most of the members, and usually no one remains a director longer than two years.

The steering committee also identified graduate students, the Grad House manager, and Dean of Graduate Studies and Research at WLU as potential stakeholders. However, because we had identified the issue at hand as focusing specifically on board transition, the steering committee decided that BOD members were the appropriate participants to interview for this study. All the BOD members, other than I, volunteered as research participants.

Data Collection Tools

For the purpose of the project, I used multiple data collection methods, as determined by the steering committee. I audio tape-recorded and fully transcribed data verbatim from a set of comprehensive, systematic, in-depth qualitative interviews. I also examined documentary data collected from other student government organizations. As Patton (1990) states, "the fundamental principle of qualitative interviewing is to provide a framework within which respondents can express their own understandings in their own terms" (p. 290). Open-ended interviews, as Rosenthal and Rosnow (1991) state, provide participants with the option to disclose more information than the researcher expected because people can speak freely. Two reasons for using a standardized open-ended interview were: (1) to ensure that the exact instruments used were available for review by the ethical review committee; and (2) to assist the interviewee(s) and the interviewer(s) to stay focused (Patton, 1990).

Questions

The BOD as a whole discussed with me what they were interested in researching. Although creating a more effective board transition was the primary goal, a secondary goal drawn from previous team-building discussions was increasing general student involvement in the GSA. However, due to the limitations of time and the steering committee's academic commitments, I focused on the former. I developed the actual

research interview questions on my own (see· Appendix B), because the steering committee members stated that time constraints prohibited their contributing to this task. Later, the steering committee appreciated the option to review and provide feedback instead of brainstorming to generate the questions as a group. I generated the questions intuitively, based on my own experience and knowledge as the GSA president, because as Herman and Renz (1998) explain, specific measures of board effectiveness represent judgements that are different for each organization. Each interview consisted of fourteen guiding questions designed to access the insight of BOD members. I also asked additional questions during the interview to clarify or elaborate ideas that the directors had presented.

Another source of information was the documentary data from the other student government organizations, also related to the transition process of their BODs. I combined data-collection methods to study the same phenomenon in the process of *triangulation.* Triangulation uses different methods to collect information. Each method has benefits and limitations, therefore using multiple means for data-collection complement the findings and more accurately represent the issue. This convergence of information was important for me as the researcher, because gathering data in a number of different ways allowed a check of validity by comparing various information sources against each other.

(Multiple-data collection methods are also known as "cross-data" validity checks.)

Verifying Trustworthiness

In examining and assessing the analysis and trustworthiness of the data, I relied on four criteria: credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985). As stated above, to ensure credibility I used multiple data-collection methods. Each method provided similar interpretations of the same data. To ensure transferability so that a reader could acknowledge the zeitgeist of a situation and judge independently the interchangeability of the circumstances, I provide a quotation-rich delivery of the findings. By specifying each step of the collection, coding, and analysis phases I also ensured a high level of dependability of the study. By retaining my audio-tapes, transcripts, interview guide, notes, and coding structure, I could reference them at any point to provide information on the process of collecting and categorizing data, therefore providing confirmability.

The verifying phase of the research was based on assessing the trustworthiness of the interview transcripts and the quotations derived from them. By asking each participant for feedback and for possible changes to the wording of her or his transcript, I met the criterion of accurate representation of each participant's reportage.

Research Relationship

From a community psychology perspective the nature of the research relationship needs to be one of mutual respect and trust. In conducting this project there were a number of ethical issues that I tried to address.

I approached each participant about partaking in the research project and then provided each person with an "information sheet and consent statement" (see Appendix C). The departmental ethical review committee suggested that the two forms, information sheet and consent statement, usually separate documents, be combined into one. This combination reduced their length and avoided the repetition of information. In the letter I made each participant aware of the confidential, voluntary nature of the interview, the right to decide not to partake or to stop the interview at any time without repercussions, and how to contact the appropriate people if they had any questions (see Appendix C). At the end of each interview I read a closing statement to the participants, reiterating confidentiality and thanking them for their involvement. This closing was also an opportunity for participants to express any questions, concerns, or suggestions to me (see Appendix D). After data analysis, I presented to the BOD an executive report which included mainly recommendations and highlights of the findings. All the representatives of other student government organizations, with the BOD's consent, received a five-page executive report as final feedback. In

addition, the GSA will receive a hard copy of the final draft of this thesis. I made all efforts to secure participants' confidentiality by excluding direct and indirect identifying factors from the thesis and feedback reports.

Ethically, as an insider evaluator I needed to be very aware of the potential conflicts of interest in my dual roles of researcher and president of the GSA (Alcalde & Walsh-Bowers, 1996). As a consequence, I felt it was essential to continually clarify my role in providing and receiving feedback from the steering committee. It was important for me to ensure that the research remained focused on evaluating the effectiveness of the transition process and distanced from evaluating the performance of the individual board members. If there were any negative comments about particular BOD members I preserved members' anonymity and kept complaints confidential. The possibility of my role as president interfering in the research process was also minimized by the fact that I could not make major decisions without referring to the BOD for input and feedback. It was the role of the BOD to critically discuss the topic at hand in a manner that has been open, fair, supportive, and respectful of the other BOD members.

FINDINGS

Throughout this section I have included my interpretation and contextualization of various quotes in order to enrich the reader's understanding of the central issue of board transition. Many of the

quotes I have used overlap and portray multiple themes; I have tried to place them where I felt they were most appropriate. I chose each quote because of how it illustrates a point; I keep confidential the identity and remarks of each contributing director.

From the participants' comments, I generated four major themes (see Table 1, p. 41) as general issues of board transition: the uncertainty about the official and operational goals of the GSA, the lack of a "big picture" perspective, the necessity of transferring information, and appreciating the potential learning experience as a BOD member.

Table 1: Major themes and minor themes

Major themes and minor themes
1. The uncertainty about the official and operational goals of the GSA
2. The lack of "big picture" perspective • Sense of not being properly prepared • Campus organizational information • University administration initiative
3. The necessity of transferring information • Maintaining contact and support • General duties, expectations, and role clarification • Manuals containing both general and specific information • Office management • Increasing awareness of the GSA
4. Appreciating the potential learning experience as a BOD member

The Uncertainty about the Official and Operational Goals of the GSA

I designed the first question to assess the clarity of each directors' perception about what they were contributing to, in other words, what were the goals of the GSA. I felt it was important to address the goals of the GSA, because as illustrated by the following quote, in the future it will be much easier to transfer information to an incoming board if everyone is clear about what (official goals) and how (operational goals) things are done.

> *I think that you have to start with the board that you have and make sure everyone is clear on what they are doing and fulfilling their jobs and responsibilities. If things are running smoothly at one point then transition to the next people coming in will also be easier. Not just educating people coming in but making sure that things are working well with the people are already here.*

I found a common uncertainty about what the directors thought they were contributing to. Most believed that the GSA advocates for students' rights and needs on and off campus. However, some people were unclear as to what the official goals were or if they had ever been defined by past GSA BODs.

Many of the responses of the directors provided insight about certain activities and resources that the GSA administered. Most of the responses also alluded to the GSA as working towards their goals.

However, not one director commented on how effective the GSA was at attaining those goals or if there were other possible goals we should have been striving for. Rather, most directors equated the activities of GSA with the official goals, and limited their perception of the goals to what was rather than what could have been. Following are quotes from three directors on this point.

To be the voice of the graduate students to the university administration, and to outside bodies that the students are likely to come into contact with... to fight for the needs of graduate students... and to provide a forum for graduate students to come together as a unified body on campus to share ideas and generally enhance the graduate experience.

To enhance the full time graduate experience at Laurier, and to advocate for students within the university and also within our national and provincial student connections and associations.

To get information out, to make decisions that would best serve graduate students at this university and to make sure that graduate students are aware of what is offered.

The uncertainty of the directors about the goals of the GSA was indicative of the next general theme in the findings. Many of the

directors felt they lacked a "big picture" perspective about the GSA, namely, what do we do, who is involved, and how do we fit into the operations of the university.

<u>The Lack of "Big Picture" Perspective</u>

<u>Sense of not being properly prepared.</u> The weak level of congruency in the directors' understanding of GSA goals and the lack of a "big picture" perspective for most directors reflected being neither properly prepared nor formally introduced to the GSA. Many directors were unsure about how the GSA fit into the university as a larger community, and that problem affected their ability to familiarize themselves with the culture and history of the GSA. For example, in interacting with other university departments there were no terms of reference or knowledge about who does what and hence how the GSA operates on a daily basis. One director illustrated this shortcoming.

> *I still felt very lost in what I was doing, in terms of how the*
> *GSA worked. I was never given any clear outline of who was*
> *who, what happens on the GSA, what has happened in past*
> *years, how things looked. There was a lot of things that*
> *really weren't explained very clearly.*

Unfortunately, the sense of "flying by the seat of my pants," with little or no orientation was a reality for most directors. This lack of introduction resulted in many of the directors feeling "dumped" into the position. With few of the past board members remaining in the area after

their term, because they graduated or were focusing on academic goals, there was a lack of in-depth or formal orientation to the GSA. Of the directors who did receive some level of introduction from the previous board members in their position, few felt the orientation was adequate or even useful to apply to the work they were doing.

I think that was a very weak description [of my position] *now that I am here, I think that it was a very weak transition effort.*

I don't know if there were really any strengths, I felt like I was really dumped into it.

Again, due to the unfortunate reality of most directors being "dumped" into the position, a clear result was lowered morale. Fortunately, directors continued to volunteer their time, despite questioning whether their energy with the GSA could have been better utilized elsewhere. For me this concern was justifiable, because graduate students whose first priority was academic achievement and still volunteered should not have found their volunteer experiences unchallenging or unrewarding.

Another issue brought up, time and time again, during the interviews was that many directors felt unable to adequately fulfill their duties as service providers to the general graduate student population. This was raised as a major frustration for some, as two directors

explained they had been improperly informed. The directors also stated that, if they had been informed they would have gotten more out of the experience and subsequently contributed more time, expertise, and knowledge.

> *I was expected to fill two hours of office hours, but it wasn't explained to me what would be expected of me during those two hours in the office... I didn't realize that answering the phone meant knowing what we do and what services we provide and in first term it became a problem ... and I felt sort of useless because I couldn't give people information that they needed, I don't like that.*

> *I still don't fully understand it enough to explain it to a student. I really don't have a confident knowledge of that and that is just too bad, because I could have probably kept people involved in that.*

Also contributing to the lack of a "big picture" perspective was that directors felt unaware of what other people's roles and duties were. Directors were not only unclear about other people's roles but also about their own roles and therefore could not turn to one another other for clarity or guidance. This lack of information, resources, or support severely limited BOD members' ability to contribute to their fullest

potential. In my view, directors found the experience of being uninformed disempowering.

> *You don't have to know exactly what everyone is doing, but to have a general idea about what is going on. I don't know what each position does, but if someone calls about the health plan I should know what to tell them.*

> *I still don't feel like I have a good grasp on exactly what everyone is doing.*

Campus organizational information. The lack of clear roles amongst the board members also reflected in the interactions with the larger university community. Subsequently, board members were uncertain about how the GSA fit into the larger university community. As one director explained,

> *I still think that I could have a better understanding of the people outside the GSA in the university. To no end, you can never have enough information and I know that some structure of that information is helpful.*

For me, it was very useful to start this inquiry by identifying and clarifying some of the major limitations of the previous transition. As a result, many directors were very clear about suggesting what kind of efforts would assist and prevent this vague orientation from happening again in the future. There were many suggestions from all of the

directors for improving the orientation and transition of the board. It was interesting to note how many of the ideas suggested were common throughout the individual interviews. These ideas are the focus for the next sub-section.

To begin to address the lack of "big picture" perspective, board members suggested creating an organizational map of the university departments, the GSA, and the sub-committees that have graduate student representation, along with a brief description of the departments represented in the diagram. Three directors commented on the need for an organizational map.

Something like a chart, an organizational chart showing the various departments on campus, and how the GSA fits in with the general university body, that would be very important.

Bring up connections about how we fit in the university.

A map of the administrative community might be useful. It is not essential but would be useful to know who is who, where they are, and what their functions are.

This idea of entrenching the GSA into the larger community was expanded upon by each of the directors. For example, if a director mentioned the idea of "fitting into the bigger picture," I commented on how the idea was also mentioned by another director. Then people began

expanding on the concept and suggesting ideas to improve how information and resources were organized. To illustrate, three directors expanded upon the idea of an organizational chart.

Resources such as people resources, knowing administrative contacts and positions, so we know who does what and how to get in contact with them.

The same would apply to committees and would be very useful for both. The committees could fit into the organizational chart.

A list of key contact people throughout the university, to get in touch with, and how soon to introduce yourself, and sort of identify what role they play in the whole thing. I think that would have been very valuable.

University administration initiative. Eventually, as was suggested by a number of people, the idea of having a better picture of how the GSA fits into the larger university community evolved to regard this community as the constant factor. Parts of the community could provide a degree of continuity and consistency between the incoming and outgoing GSA BOD. One suggestion was to develop the relationship between a senior university administrator and the GSA. The intention was to have the Dean of Graduate Studies and Research as an integral

part of each incoming board's orientation, and throughout the year the Dean could also support the GSA, as an advisor on operations and relations between the GSA and the rest of the university. Two directors suggested this point.

> *The university administration would take some initiative and help this out by setting up some of the meetings, in the beginning of the year... so that we can understand their role, and we get a perception from them of what they see their role is. Getting to meet the people and find out what they do.*

> *What would help transition would be if this became more the onus of the Dean of Graduate Studies, to introduce himself and his staff to the board, rather than each new board making the first contact. Explaining what the relationship has been in the past, and what it could be this year.*

At this juncture, the theme of transferring information from the outgoing GSA BOD to the incoming BOD became explicit. I began asking about what systems existed to transfer information and what needed to be developed. As I will explore in the next section of the findings, there were two concerns about transferring information from one year's BOD to the next. The first addresses how the current BOD could have been better introduced. The more prominent concern deals with what the

current BOD can change and implement to facilitate future directors taking positions within the GSA.

The Necessity of Transferring Information

Maintaining contact and support. What was most outstanding about the need to transfer information was people's willingness to make themselves available for the incoming board. Regardless of whether each of the directors was continuing at Laurier or in the Kitchener-Waterloo area, most everyone thought a one-on-one personal introduction to the roles and expectations and an opportunity to ask questions would greatly increase the capacity and effectiveness of an incoming BOD member. Each director explicitly stated that the current members should provide this valuable service and courtesy to the incoming BOD.

> Making sure that we talk to some of the people who are taking over for us. Making them aware of what is the specific roles, and giving them as much information as possible about the position in which they are fulfilling. Also, taking the time to keep in touch with them if we can, when we are off campus, to find out how they are doing, if they are having any problems or not.

> I think it would be very important for us to meet the people on a one-to-one basis, but a telephone conversation or e-mail contact would be great, anyway that you can get in touch with

the person to answer some questions, I think it would go a long way to assist the person. Let the person know what you have done in the past, how to contact the administration that you have in the past, any way that you can contact them would help.

The initial stage of board orientation it would be good to have a good component of roles and what is expected from board members right at the beginning... I think that the orientation stuff for board members, workshops, and role identification stuff are very important activities.

As the president of the GSA, I was delighted to hear that each of the BOD members were willing to make their contact information available, even after the formal conclusion of their term as members. Despite most of the members experiencing a discouraging and unproductive orientation, many participants were committed to ensuring the incoming board did not go through a similar experience. For example, one director said:

Because I felt sort of dropped into to it, I would be willing to explain the things you need to know, and the requirements you need to fulfill. I really want to get someone who is committed to it and will take the responsibility to pass it on next year.

Many of the directors also suggested how an orientation workshop could be improved for next year's incoming board. For most of the current members, it was important to balance the process-oriented, team building exercises with a task-oriented, role introduction and clarification workshop. Many directors felt, in addition to maintaining contact after they leave, that an orientation workshop with both the out-going and in-coming boards would provide ample opportunity to transfer information to and answer most of the questions of a new GSA executive and BOD.

> *Maybe they could have a question and answer period about anything that the new people don't have a clue about, like roles, and what they entail, any problems that they might foresee, that you could problem solve around. Spending time to answer questions, and having binders for each position to pass along.*

> *If we are still around, it would be nice to talk to them, met with them, have them ask a lot of questions.*

One director identified as part of the objective of having an orientation workshop, in addition to providing role definition and clarification, was transferring information not easily written or otherwise documented. For example, sensitive information that we would not or

could not document, such as who on campus are our allies and challenges, can be transferred verbally through an orientation meeting.

Maybe some of the intuitive or soft information, the culture, the nature of the relationship between this board and the WLUSU board. Maybe a history of what we have gone through, and it is still sort of growing pains with the introduction of the Grad House, explaining some of the work that we have done this year and would over to see it continue on.

General duties, expectations, and role clarification. Along with an unclear understanding of the goals of the GSA, a lack of a "big picture" perspective, and a concern about how to transfer information, all directors discussed their uncertainty and lack of clarity of the general roles, duties, and expectations of a responsible BOD member. Not having a clear idea about what each director was responsible for reflected how poorly the GSA prepared them to address the concerns and questions of the general graduate student population, as asserted by the following three directors.

At least if I could give basic information and if they wanted further information I could direct them to the right person, that would be great. I felt that I needed a lot more background about what we offer, what is available, you know there are different things that we offer that I wasn't really clear on and that was what a lot of the questions were. So, as a GSA

member providing services in the office, I didn't really feel that

I fulfilled that very well.

In that way the board of directors would have a better idea of

what their exact role is, and how their role can help out my

position and my position help out their roles.

Each one of the board members should go over what the

duties of the roles, they should share this information so that

if someone is looking for information then they can question

other board members about their roles, and make them

accountable.

Manuals containing both general and specific information. As the
interviews proceeded, the issue of transferring board members' roles and
responsibilities became clearer. Members needed to know how
information, in addition to a transition workshop, was going to be
transferred. All the details, experiential knowledge and pertinent
information needed to be communicated verbally and also secured in a
more permanent form. Having opportunities to process the information
both verbally and in a written format, as stated by the following director,
would strengthen transferring the experience and knowledge.

I think that having it in a manual but also having it verbalized

in a training session would be very helpful.

As one board member expressed, what would make the BOD orientation manual a success is paying specific attention to what information is compiled and how it is organized.

I think that what goes into the binder is the determinant. There has to be enough information about roles in the binder. The person reading it will have an idea of all the expectations from him or her, not just general information but a detailed outline so that person will be well educated.

This suggestion of providing specific details about each BOD member's duties and responsibilities uncovered a potential format for the manual. When I then asked directors to elaborate on what details would be important to include in the manual, they provided a slew of suggestions not only about the information it would contain but also about the format.

The manual needs to be fairly simple, short and easy to read.

I am busy, I don't have a lot of time to read through a ton of stuff, if it is brief and simple I will read it.

You don't want too much because if you put together it is going to be too much, but if you separate it in a binder with different headings it will be okay. You will be able to find

information fast too, where as if you put everything on one

page then you are going to be in trouble.

It became very clear to me that whatever effort I spent developing a board manual needed a lot of thought to produce a concise and well-structured document. I wanted to provide the GSA with something concrete to be used and re-developed to meet the needs of future boards, rather than serving as just a paperweight on a shelf.

In some of the earlier questions I discussed with the directors the content of a potential orientation manual. What I determined next was specifically what documentation of information, resources, and activities I needed to compile to best suit the needs of the BOD. On this point every director had something insightful to contribute.

Definitely a binder with the mission statement, a flow chart of

the GSA itself, and a flow chart of how the GSA fits into the

university. Maybe outline whom the GSA represents and

maybe a proportion of how many graduate students in each

department. Job descriptions, and a description of a typical

thing that they would look after.

Information on how to run a meeting, making sure people

know about motions, seconding and stuff like that.

Stuff on the health plan, bursaries, money that is available, bursaries, general stuff on positions what do people do, elections. Office hours, the hours of the building, special events and social events in the binder.

Office management. At the same time directors were recommending types of information to include in the orientation manual, some directors also identified the office filing systems as needing attention. The lack of a clear, office filing-structure furthered the inability of directors to effectively fulfill their duties and role as BOD members.

There was also other parts of information, history, that were in other parts of the GSA office that I missed. There were pieces that would have been essential, specific to my position I needed to know... it just wasn't accessible and I had to piece it together.

Setting and defining some hard file names so that they don't change from year to year. Because sometimes is such and such one year and the same thing but a different name, we need to define it so it is consistent from year to year and comparable. If there is some structure then it is that much easier to transfer information.

Just knowing where to go and having something at your fingertips would have been very helpful.

The directors also identified that an improved filing system would not only have assisted their efforts but would also assist future BODs. An objective was to develop mechanisms to minimize the time needed to familiarize directors with the GSA, enabling future BODs to accomplish their work more productively and with fewer problems.

I think it would be very useful and that people would be able to do their jobs more effectively. If that information were available people would save time in seeking that information and spend more in actually acting out what they are supposed to be doing. You will be taking a lot of the time that was needed looking for things, and figuring out how resources work so that would enable people to be a lot more productive in what they are doing.

If everyone was aware, it would mean a lot less work for any one person, always having to refer these questions to one person, when we are quite capable of doing it ourselves. Some questions would definitely have to be refereed but some stuff you can do on your own.

<u>Increasing awareness of the GSA.</u> Another aspect of transferring information from one board to another was the concern that some

directors had to improve communication. Whether between the board members or with the GSA BOD and the general graduate student population, most directors identified communication as integral to raising awareness about the GSA. Increasing awareness of what the GSA does and how we could be of service to the graduate students on campus was a concern of a number of directors.

We need to consider ourselves a service and start improving

the service that we provide.

There were also suggestions about how to effectively let graduate students on and off campus know about the GSA as an administrative body. This year as in previous years, there was a great need to actively pursue board members to replace the current BOD. As identified by one member, there were a number of suggestions about how to go about recruiting people interested in student government.

Listing the Board members, and contact information, and then

listing what positions are not yet filled. A GSA contact sheet,

and maybe a brief one liner of what the position is.

Another director identified that the board also should have made efforts to introduce themselves to incoming graduate students before arriving on campus. The GSA should have let the general graduate student population know well in advance, by letters and other resources such as the Internet, what the GSA offers. Then it would be up to the

students to make contact with the GSA or at least be familiar with the services when arriving on campus.

> *It is important to get information out to students before they come here and during the orientation week also, and let them know, at least that they are needed and that the GSA is interested in having the students' participation. It is important for the students to know about the Grad House, for them to know what services are offered, and the GSA positions, and what the board expects. If students know what the services are, that will be important.*

Much of my focus on the findings was on how to improve the current situation in terms of board transition. The directors provided much information and insight about what could be done to improve board transition. However, what remained for me to do was identify and appreciate what the BOD felt they had gained, notwithstanding the less then ideal transition, from being involved with the GSA. Despite the disastrous orientation many directors experienced, they emphasized the opportunities to learn new skills and expand their knowledge.

Appreciating the Potential Learning Experience as a BOD Member

BOD members learned skills from their experience applicable to their lives after finishing graduate school. Many directors will continue in professional careers where the activities familiar to the GSA BOD are a way of everyday life. Working with a board of directors, and being

familiar with the proceedings of a board meeting are just two of the many experiences the directors felt they could benefit from.

> *It is a really great learning experience... It really teaches you how to work with different people, you could sell it on all the other merits besides just being the GSA, and it has a lot of other amenities to it. There are many skills you get out of it, being in a meeting and presenting your ideas concisely and quickly, sticking to a timeline, as far as meetings go.*

For many directors using learned skills and having the opportunities to develop new skills constituted practical "hands-on" training. This experience and new knowledge not only prepared directors for when they do leave the university, but would continually be applicable to their occupational and volunteer lives as professionals in the workforce.

> *Certainly while they are there, if you make their life better while they are here, to me, that makes their life better for when they leave because you are putting tools in their pocket and contacts and new ways of doing things, just the history of having had a good experience.*

In addition to building on their strengths and developing their abilities, directors enjoyed the experience. Unfortunately, I did not seek out the extent to which BOD members enjoyed their experience, rather I

focused on deconstructing and reconstructing the process of board transition.

I am really glad I got the experience and I hope that other people would be able to get as much out of it.

Other Student Governments' Board Transition Process

I sent an e-mail request (see Appendix E) to 19 other undergraduate and graduate student government organizations across the country and received seven responses. Each representative from the various organizations, either executive member or administrative staff, expressed that there was limited, if no, "formal" transition process. What I found was not promising and highlighted that the GSA situation at WLU is common amongst student government organizations. Two organizations used documentation as the primary medium to transfer information, while two others had a window of transition where incoming and outgoing board members could engage in dialogue about the various issues affecting the organization. One organization had a "year-in-review report" as well as several orientation meetings, and one organization representative expressed "we don't do much." Only one organization that responded had a combination of documented material and meetings, however the consistency of the process was limited

because each year the person serving as the transition organizer

changed.

DISCUSSION

At the beginning of the thesis, I identified my personal investment

in the project as the GSA president. I explained how my experience with

the GSA pushed me to promote with the current BOD members a more

effective board transition. Accordingly, I evaluated the mechanisms that

existed to orient incoming board members at the GSA and what if any

improvements were needed to make the future transition of BODs the

best possible.

The themes I generated in the findings were in accordance with the

ideas outlined in the <u>Conceptual Framework</u> section. I bridged the

findings of the research with the conceptual framework outlined above.

In terms of community psychology, we can immediately recognize how

the theme "appreciating the potential learning experience as a BOD

member" coincides with the *capacity/strengths building*, and a "lack of a

big picture perspective" fits into an *ecological perspective*.

In developing an intervention, maximizing board effectiveness in

terms of board transition, I needed to refer to and include the resources,

abilities, and strengths identified by the community. My focus on

improving or developing effective board transition needed to be based on

the organization's expressed needs and capacity. In terms of capacity

building it was clear, despite the poor transition process, how much

people learned as a result of being involved in the GSA. Several directors expressed that they had learned new skills and knowledge about many matters. Many directors learned about the technical process involved in a board meeting, how to vote, the various types of motions, and other aspects of conducting a board meeting. Other board members learned new software packages, working with the desktop publication, Office suites, Internet publishing, and accounting programs used by the GSA. Many board members were introduced to the budgetary process and the effects of financial decisions on each department. Some directors also learned about policy analysis and development through their experience at the GSA. However, continually identified as a limitation was increasing the level of good communication between board members. That is, board members needed a clear idea about what each person was responsible for and what they did.

From a CP perspective we must consider the long-term sustainability of any intervention as based on the resources of the community. In this way, the recommendations (e.g., the development of an orientation manual and workshop) were specific to the needs of the community and created a sense of ownership by the members. The intention was to develop an effective intervention, meaning that members of the BOD assisted in the development and implementation of an action plan based on the strengths of the community.

In terms of an ecological perspective, I encountered throughout the findings how members of the BOD were very unclear about what other board member's responsibilities and duties were and how the GSA, as a whole, fit into the "bigger picture" of the university community. In relation to the GSA, very few board members had a clear idea about how they "fit" in their environment, because they lacked a "big picture" perspective. Few people knew what systemic factors influenced their work and what factors they had influence over. For example, one board member expressed the concern of not having a clear picture of what the budget was for her position. Through most of her term she was not sure about how much money was budgeted for her or how much money she had already spent.

From a CP perspective, an intervention must be based on the understanding that changes in any one area or aspect of an environment affects the whole community. As discussed above, an effective, long-term, sustainable intervention needs to be based on the identified resources and strengths of a community. The ecological perspective suggests that any change in part of the environment requires adaptation at all levels of the organization. In the case of the BOD, people needed to learn from the experience of good or bad transitions and alter their behaviour accordingly and strategically.

In order to increase the effectiveness and develop the board transition process at the GSA, the action plan was developed considering

these principles and findings as consequential. For example, in suggesting an action plan I considered how creating a board orientation manual reflected an ecological perspective, capacity building, and empowerment.

The third and final principle of CP is empowerment. I did not equate empowerment with either theme of "uncertainty of the official and operational goals of the GSA" or "the necessity of transferring information." My reason for not making this analogy was that the experience of the BOD was not empowering but disempowering. Had the official and operational goals of the GSA as well as the transference of information from the previous to the current BOD been clear, these themes would have contributed to the directors' empowerment.

Having a clear understanding about the goals of an organization, as well as having been properly and thoroughly introduced to members' role, worked to encourage peoples' sense of control and power in the environment. These two themes, even though they do not correspond to empowerment like an ecological perspective and capacity building, are components of empowerment. Although these themes are only two factors of many that lead to empowerment, they are building blocks in the process. Only when a person feels clear and confident about her or his role in a community, can she or he emerge as a person capable of empowering herself or himself.

I would further argue, as illustrated in Figure 1 (see p. 10), that people can create empowerment, only if there exists an environment where capacity-building and an ecological perspective are facilitated. In an intervention absent of appreciation for capacity building, an ecological perspective will be that much more difficult to obtain. Without both capacity building and an ecological perspective, empowerment cannot exist. It is only when the former principles have been developed that the latter begins to occur. Each principle builds upon the last and if that interlocking foundation is lacking it is highly improbable that one will obtain empowerment.

Making the Link to Previous Research

I believe this project relates to the existing literature because the process of the study and the subsequent recommendations incorporate the development of effective board transitions based on interlocking components of CP, LO, and OD.

Trickett and Birman (1989) state that resources for community development can take many forms: the directors felt that documented material and orientation meetings would best support designing an effective transition process and developing the relationship between the GSA and the Dean of Graduate Studies and Research. Levine and Perkins (1997) explain that in order to create a sustainable and enduring change one must understand how a "community cycles its resources" (p. 146). To understand how the GSA cycles its resources, I needed to

appreciate that each year the specific composition of the GSA changes and so do the needs. For this reason, I suggested in my feedback to the BOD that each year it should review the orientation workshop and manual to highlight the strengths and develop the limitations.

As was illustrated by the findings, the GSA strives to engage in the redefining of the organizational structure. Directors questioned the transition process and sought to improve it. Due to the high rate of annual transition, the GSA is not limited in its ability to adapt and change the culture of the board. If the BOD requires that, in order to create an effective transition, learning or change in all board members throughout the GSA is necessary then the change is easily facilitated and obtainable. The high level of turnover minimizes the chance for potential negative attitudes or skewed perspectives from members who have been involved for a long time. In my experience, the GSA is actively and continuously engaged in a number of the key components outlined in learning organizations. As Senge (1990) affirms, organizational learning is facilitated by learning at all levels of the organization, a capacity to adapt, redefining structure and culture, and engaging in systems-wide thinking.

In terms of the literature on organizational development, the connection between what is seen as an effective board of directors and what the GSA is striving for is clear. Smith and Shen (1996) state that an effective nonprofit board emphasizes and regularly revisits the

organization's mission and policies. I found that the GSA's goals, purpose, structure, and rules of governance were not clear to the BOD, hence there was a definite need to develop and make them explicit. In addition, Green and Griesinger (1996) emphasize that board development and strategic planning are major components of board effectiveness. The entire exercise of evaluating transitional processes that the BOD engaged in can be viewed as an application of board development. Also at the same time, as part of a separate project, the GSA is undergoing long-term, financial planning and change.

Originality of Research

The effectiveness of a board transition process has not been the central point of previous applied scientific research. Although there was limited literature on board member orientation and training manuals, there has been limited scientific evidence to support these resources or activities as being effective or suiting the needs of an organization.

This project also marks the first time board transition has been explored in a student government organization. From the literature search I conducted I found no other documentation on the development of effective board transition within student government organizations. In fact, as reported above, few other student government organizations across Canada have a formal transition process. The research project also builds on the conceptual link between community psychology, learning organizations and organizational development. Although the

relationship between these three branches of applied behavioral science have been implicitly explored in the past (Argyris & Schön, 1978; Argyris, 1993), this project makes the relationship explicit through Figure 1 (see p. 10).

Strengths and Limitations

A participatory action model gave much strength of integrity to the project. Another strength of the project was that its goal was to serve the GSA by uncovering and analyzing useful information to develop the effective BOD transition. Yet another strength was that participants were involved in the development and implementation of the research. Another strength of the research process was that all of the board members volunteered to be involved in the study. There was a high degree of interest amongst the BOD members to see the GSA improve for the next year, which reflected in the directors' dedication to assisting the research project.

A major limitation of the study was its utilization-focus. The nature of many student government organizations includes a major transition, which replaces most of the board members each year. The possible limitation here is that the next board may not appreciate the time taken to create this document, and may choose not to consult it as a resource.

Another limitation was the minimal participation of the steering committee in the data collection and analysis phase. Due to their time

restrictions, the steering committee participated minimally during these phases. As a result, the skills and knowledge of conducting qualitative, participatory-action research were not directly taught or transferred. A major component of the participatory-action research model is the desire to teach research skills to participants. The goal is to provide an organization with skills so that in the future it could conduct an evaluation or assessment without the involvement of a research "expert." For example, if in three or five years, a future GSA board want to readdress the issue, they will not necessarily have the skills to conduct the study.

Another limitation of the study was that I would change some of the questions to more specifically address what specific skills directors acquired through their experience with the GSA.

Suggestions for Future Research

I would suggest for possible next steps to conduct a quantitative component of the project. I believe that quantitative data would complement the strengths and limitations of the qualitative data. By providing an additional perspective of the same issue, I can build the level of accuracy and trustworthiness of the research. After I started the data collection with the other student government organizations about board transition, I had the idea that a list of short, close-ended questions could have been implemented.

If I were to conduct a similar study in the future, I also would combine qualitative and quantitative research on multiple campuses across the country. It would be useful to study possible similarities and differences in measuring effective board transition or developing activities and resources. I also suggest exploring the similarities and differences in board transition in different cultures. For example, at the WLUGSA the board meetings are based on a democratic process. I would be interested in knowing similarities and differences in various student governments transition in, for example, an organization that has by-laws based on consensus building. Would the resources and activities outlined in this project still be valued?

What I Personally Learned

Through my immersion in this project my personal growth has expanded in many ways. I have learned a lot about working as an administrator from a CP perspective. I have also learned a lot about my writing style and how much I struggled to write in a clear, concise, and active voice. I have learned how to create an effective orientation and transition process. I have learned about my assumptions and values, especially in terms of conducting research and working as an administrator. I have learned that quite often my values about how to conduct naturalistic, participatory-action research clash with my implicit assumptions, ingrained from years of working from "objective" research framework. Conducting research from a CP perspective has been

challenging because of my constant struggle to write with an active voice and not distance myself from my writing.

I have learned to appreciate the way I work and regard it as a strength and not a hindrance. I tend to, before I write a single word, spend a lot of time mulling ideas over in my head. I used to regard this time spent massaging ideas in my head as procrastination, but recently I have re-framed it to be a positive, high-energy, working style.

I have also learned that conducting insider-evaluation, especially being the president, is not easy. One thing I was constantly trying to be aware of and suppress was my reaction and defensiveness to board members' critiquing the orientation process they had. I felt partially responsible, as the president, and was constantly trying to not let that feeling of defensiveness and guilt interfere with the interviews. However, I have realized that what is more important than feeling guilty is feeling the sense of agency to change what will happen to future BODs.

Lastly, I learned that conducting a thesis is extremely demanding, socially and emotionally. To be without the constant support of friends and family has been stressful and enervating. However, academically, it was easy and productive to isolate myself and work most all the time. I think that had I not been in Waterloo, I would not have been able to accomplish what I did in the amount of time that I did. The resources I had available here at Laurier, both physically (Internet access to libraries) and personally (support of my advisor), were outstanding.

Based on the above discussion, I developed several recommendations for action. My suggestions flow from the model (see p. 10) described earlier and transform the concepts of CP, LO, and OD into action furthering the development of effective board transition. I divided the action plan into recommendations for immediate, short-term, and long-term implementation.

Recommendations for Immediate Implementation (1 month)

Focus the development of the GSA on identified strengths. Board members referred to numerous benefits they derived as a result of being involved with the GSA. The following recommendations utilize this information and seek to build on the strengths of BOD membership. Any activities resulting from the recommendations also should be based on strengths. For example, if it is clear that having board experience will be useful in people's occupations once they graduate, then the GSA should focus on highlighting this benefit throughout the year and use it as a tool to recruit new members. This recommendation should be the responsibility of any board members implementing future action.

Develop and make explicit the goals of the GSA. I suggest that the goals of the GSA be made explicit. Having the current and incoming BOD define and adopt a mission and goals statement together would be beneficial, as it would alleviate much of the uncertainty people have about what the GSA is all about. This exercise would provide priorities and boundaries, purpose and direction for the incoming board members.

This recommendation should be the responsibility of the president and any board members designing the orientation workshop.

Develop a board orientation binder. The binder should be divided into two sections. The first section should be general information about the services and resources available via the GSA. For example the binder should include: information on bursaries, Assistantship for Students Attending Conferences, Externship, Supplementary Medical Insurance Plan, conferences at which the GSA should have representation, general financial information, contact information for all board members, general roles and expectations of each board member, board meeting procedures, office procedures information, university contacts, committees with GSA representation, university organizational chart, general expectations of a board member, and a list of academic deans, administrative assistants, and graduate secretaries.

The second portion of the binder should provide in-depth, detailed information about each particular board position. Some of the information included should be: a timeline of when events/activities should occur, a calendar of when relevant activities external to the GSA occur, a detailed contact list, descriptions of all contacts and when/why to communicate with them, a detailed description of roles, duties, and expectations, a budget for each position (if appropriate), all documentation from previous years (original/blank forms, correspondence letters, posters, etc.). Each member would then have a

binder with general information about everyone's roles and duties but also specific information about their own role. This recommendation should be the responsibility of the president and any board members developing the binder.

Develop an orientation workshop. The workshop, in order to provide the most beneficial and holistic perspective for incoming BOD members, should require the attendance of all outgoing board members and all known incoming board members. The orientation should happen in early April to facilitate both incoming and outgoing members being present. The workshop should be divided into two portions to provide role introduction and clarification as well as a social atmosphere. The social activity should mainly be for the incoming board members to get to know each other better and hence provide an opportunity, possibly through pre-planned activities, to have fun. This recommendation should be the responsibility of the president and any board members designing the orientation workshop.

Provide contact information. Outgoing board members should be required to provide as much contact information as possible to the incoming board members (phone, address, email, or parent's address if an individual does not know her or his next address). This information gives the incoming board members an opportunity to ask questions or seek clarification about their duties and role, after they have been

immersed in the GSA. This recommendation should be the responsibility of the president to implement.

Recommendations for Short Term Implementation (2-6 months)

Develop regularly planned GSA board member workshops.

Workshops should happen once a semester (late October and again in late January). This opportunity could be used to plan upcoming elections and orientation, to have team-building exercises, to brainstorm on issues challenging the GSA, to develop action plans, or to evaluate the status of a previous action plan. The workshops should be an all-day event so as to provide ample opportunity for all pressing issues to be explored and adequately addressed. This recommendation should be the responsibility of the president and the chairperson to implement.

Outgoing board members should check-in.

I highly recommend that each outgoing board members be obligated to contact (email, phone, write) the incoming board members either in late September or early October. The onus is on the outgoing member to make first contact and not the incoming board member who might not feel comfortable calling or emailing someone they barely know. This recommendation should be the responsibility of all outgoing board members.

The elections should take place earlier in the year.

This initiation would provide more time for incoming board members to become acquainted with the activities and resources of the GSA as well as the

roles, duties, and expectations of their position. This recommendation should be the responsibility of the president to facilitate with the BOD.

Board members should find a potential board member replacement. Board members should be made aware in late November or early December that they need to find a suitable, responsible replacement for their position. Once a potential replacement is found this person should invited to attend meetings, such as those of the GSA board and various committees. A potential board member could be introduced to the other current BOD members and be involved in discussions about the GSA. This recommendation should be the responsibility of each board member.

Maintain regular contact with the Dean of Graduate Studies and Research. The relationship with the Dean and the GSA exists now, however, there is room for growth and a need for clarification about what resources are available through the Dean's office. The Dean can serve as a constant personal resource to the GSA in the yearly turn-over of the BOD. The Dean can provide her or his perspective about what the previous years' BOD did and why, as well as make available administrative and physical resources to assist. For example, each year a mailing of GSA information can be sent with the admissions/acceptance packages for graduate students. This recommendation should be the responsibility of the GSA president to fulfill.

<u>Recommendations for Long-term Implementation (6-12 months)</u>

<u>Re-evaluate the utility of board member binders and orientation workshops.</u> Each year the binder should be re-examined to assess the need for additional information or for re-working existing information. If there was any information excluded from the binder, the BOD should make sure it is taken care of for future BODs. The orientation workshop should also be assessed to identify whether or not enough information, or too much information, was provided, for example, a heavy focus on role clarification and not enough on social events. This recommendation should be the responsibility of the president and the secretary/director of policy to implement.

THE IMPACT OF THE RESEARCH PROJECT ON THE GSA

A number of these recommendations have already been implemented. At our last board meeting (April 1999) we all provided our future contact information to pass along to the incoming board members. I developed a Board Orientation Binder (see Appendix F) to give to all the incoming members, which encompassed many aspects of the GSA. A member at large and I organized an orientation workshop for the incoming members. The workshop followed the recommendation of this thesis and was a complete success, based on conversation with incoming and outgoing members. Finally, all of the directors still in the city have met with the incoming person in their position to discuss roles, duties, and expectations. In fact, most board members have met more than

once already. This student government organization has begun the development of effective board transition and organizational change.

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APPENDIX A

Popular Resources on Board Orientation

Board Development Program of Alberta Community Development. (September 16, 1997). Job Descriptions for Officers of the Board. Developing Job Descriptions for Board Members of Nonprofit Organizations [On-line], Available: http://www.ccp.ca/information/documents/gd6.htm

>This source offers guidelines for developing job descriptions, listing various duties and responsibilities, for the various officers of the board.

Board Development Program of Alberta Community Development in collaboration with the Muttart Foundation. (September 16, 1997). Orientation of new Board Members [On-line], Available: http://www.ccp.ca/information/documents/gd7.htm

>This source offers practical information about both process and physical resources to guide a board to effectively orient a new board members to the organization.

Canadian Center for Philanthropy. (March 31, 1999). Board of Directors, general [On-line], Available: http://www.ccp.ca/information/boards_of_directors/general/boardsgen. html

>This offers various on-line books, pamphlets, and workbooks to assist in board governance, development, administration , and limited references to board orientation.

Internet Nonprofit Center. (April 4, 1999). Board of Directors [On-line], Available: http://www.nonprofits.org/npofaq/keywords/1a.html

>This source offers no material relevant to board transition or orientation, but provides a lot of material directed at guiding the governance and direction of a board.

Local Board of Health. (1982, November). Orientation Manual. Toronto, ON: Author.

>This source is a actual resource as an actual orientation manual used by the Toronto Board of Health.

Appendix B

Research Questions for Interviews

1. What are the goals of the GSA?
2. How do your role and duties complement the GSA Board?
3. What were the **strengths** of how the duties and expectations of your GSA Board position were introduced to you?
4. What were the **limitations** of how the duties and expectations of your GSA Board position were introduced to you?
5. To make your transition as a GSA Board member more effective, what could the **Board member in your position last year,** have done?
6. To make your transition as a GSA Board member more effective, what could **last year's GSA BOD** have done?
7. What are board member's responsibilities, with respect to board transition, as an outgoing member?
8. To gain a more clear understanding about what your role with the GSA entails, **what activities would assist you NOW?** (e.g. team building, one on one conversations)
9. What kind of activities will assist future people in your position?
10. To gain a more clear understanding about what your role with the GSA entails, **what resources would assist you NOW?** (e.g. board member binder, information about e-mail, telephone, map of university administrative community)
11. What kind of resources will assist future people in your position?
12. If an effort were made to compile information about what resources (e.g. information or contacts) exist, both within the GSA (internal systems) and the university (external systems) **how would this be useful?**
13. What three to five things would be most important to be included?
14. What other types of information would be important to compile for the incoming GSA BOD?

APPENDIX C

<u>Study Information Sheet and Consent Statement</u>

Wilfrid Laurier University

PLEASE READ THIS DOCUMENT CAREFULLY. SIGNING INDICATES THAT YOU FULLY
UNDERSTAND AND CONSENT TO THE TERMS OUTLINED. IF YOU HAVE ANY QUESTIONS
PLEASE ASK THE RESEARCHER (ROLANDO INZUNZA). THANK YOU.

Board Transition in a Student Government Organization:
Developing Effective Organizational Change

This letter is to inform you of the study being conducted with the Graduate Students' Association
(GSA) of Wilfrid Laurier University (WLU). This research project is being conducted as part of
my degree requirements and I am inviting people to participate in the study.

The study involves interviews, and I hope that by clearly outlining the data collection process you
will be willing to be interviewed about your experience as a GSA Board of Directors (BOD)
member. In order to conduct the research I had to pass all information you will receive, or
questions you will be asked, through the review of a research ethics committee at WLU.

Your participation in this study is voluntary. Refusal to participate or discontinuation of
participation will involve no penalty or loss of benefits (i.e. your remuneration from the Graduate
Students' Association) to which you are otherwise entitled.

1. Purpose

   The purpose of my thesis has been developed with the GSA Steering committee; it is to
   develop effective mechanisms to alleviate the stress of the transition each year between the
   old and new BOD. Studying the GSA, I will examine what mechanisms exist to assist the
   process of transition, and what, if any, need to be re-structured or created to develop a more
   effective transition process. My research exploration will not be directed to measure the
   performance of the board or the individual performance of the members but the effectiveness
   of the transition process of the GSA.

2. Procedure

   I am asking that each participant be involved in an in-depth qualitative interview. If you
   choose to participate, I will ask open-ended questions about the effectiveness of the board
   transition and how it can be improved. To ensure accuracy of the data collected, the
   interview will be audio tape-recorded.

3. Expected duration of participation

   An interview will last from one hour (1 hr.) to an hour and a half (1 ½ hrs.). I will also invite
   participants to review the transcript of their own interview and the preliminary analysis of
   their interview, if they wish, as a way of assuring the information you shared is accurately
   represented. If you choose to do so, this will require more time than the initial interview.

4. Reasonably foreseeable risk or discomforts

There will be no deception in this study, and for that reason the risks to participants are greatly minimized. There are no foreseen physical, psychological, or professional risks.

5. Safeguards to be used to minimize risks

All efforts will be made to secure participants' confidentiality; no direct and indirect identifying factors will not enter the thesis. However, due to the fact that only ten participants are involved in the study, people might be identifiable in reports. As a safeguard only general themes and anonymous quotes will be used in the report. For the final document, specific permission from the participants will be sought if there is any doubt about the confidentiality of who has made any particular quote.

The information collected from the study will be available only to researcher, unless otherwise specified in this document (i.e. #3 Expected duration of participation). The tapes and transcripts from the interviews will be stored in a secure environment, and will be destroyed at the conclusion of the study (May 30th, 1999).

There is a potential for a conflict of interest because I am serving a dual role, as researcher and president of the GSA. However, if the research focuses on effective board transition rather than on effective boards, then my personal experience can serve as an asset for interpretation rather than a hindrance. I will ensure that the research remains focused on evaluating the effectiveness of the transition process and distanced from evaluating the performance of the individual board members.

6. Benefits to the participant or to others

The benefits of cooperating in the study for the participants are direct. Hopefully the organization and participants will find the data insightful and informative about highlighting structural strengths and challenges for the GSA. The intention of this information is to direct any efforts for change and development within the group environment. The participants will have a chance to tell their 'stories' about, for example, the process of being involved in the GSA.

7. Protecting confidentiality of records identifying the subject

It is my intention to audio tape-record the interview. This tape will be used for research purposes only. I will be the only person with access to these tapes. The tapes will be destroyed at the end of the study. If at any time a participant chooses to withdraw from the study, all information from the interview, the audio-tape and the transcript will be destroyed and will be removed from the research reports, at the participant's or researcher's request.

Your identity will be protected and confidential at all stages of the analysis and report writing, and your participation is voluntary.

8. Feedback

Each participant will be offered a copy of the transcript of the interview to review, if they wish, as a way of assuring the information shared is accurately represented. Each participant will also be offered an opportunity to review, if they wish, a summary of the information as the preliminary results, and any resulting material(s) produced from data collected.

Providing a documented report to each member, and also offering a general question and answer period with the participants will provide a summary of the findings to the participants. The researcher will provide the documented report to participants by April 1st, 1999 and the question and answer period will occur before April 30th, 1999. I will submit the subsequent analysis, and report from this interview as part of my thesis project required for my degree requirements.

If you have any questions at any time about the study or the procedures you may contact the researcher, Rolando Inzunza, at (519) 747-4057 or his thesis advisor, Dr. Walsh-Bowers, at (519) 884-1970 ext. 3630. If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Dr. Linda Parker, Assistant Dean of Graduate Studies and Research, Wilfrid Laurier University, (519) 884-1970, extension 3126.

Your participation in this study is voluntary; you may decline to participate without penalty. If you decide to participate, you may withdraw from the study at any time without penalty and without loss of benefits to which you are otherwise entitled. If you withdraw from the study before the data collection is completed your data will be returned to you or destroyed.

I have read the document carefully and understand that signing implies that I fully understand and consent to the terms outlined. I have received a copy of this form. I agree to participate in this study.

_____   _____   _____
Participant's Name   Participant's Signature   Date

_____   _____   _____
Investigator's Name   Investigator's Signature   Date

Appendix D

Closing Statement

Thank you for your time, the interview is now complete. Do you have any questions to ask of me?

I want to again remind you that your identity will be protected and confidential at all stages of the analysis and report writing, and your further participation is voluntary.

Again, I want to clarify that the interview was recorded to ensure accuracy of the data collected. The recorded tapes and transcripts will be available only to the interviewer (me) and will destroyed upon the completion of the study. You will be provided with a copy of the transcript of the interview to review, if you wish, as a way of assuring the information you shared is accurately represented. You will also be given an opportunity to review, if you wish, a summary of the information as the preliminary results, and any resulting material(s) produced from this data.

I will submit the subsequent analysis, and report from this interview as part of my thesis project essential for my degree requirements.

Thanks you for your participation. If you wish to contact me for any reason, please do not hesitate to call me at home (747-4057).

Appendix E

Student Government E-mail Request

Hi _____,

My name is Rolando Inzunza. I am the president of the Wilfrid Laurier University Graduate Student Association. I am trying to develop our Board member package (i.e. manual, orientation, and workshops) for the upcoming transition. I am curious to know what processes your organization has in place to introduce newly appointed/elected board members to the roles, expectations, university community, student government political climate, etc.

I am in the process of contacting a number of another student government organizations to compile and expand upon the process we have in place here at the WLU GSA. I am willing to share with you, and the other student government organizations, with a summary of the findings.

Please feel welcome to contact me if you have any questions or concerns.

Thank you,

Rolando Inzunza

Appendix F

Board of Directors Orientation Manual

Table of Contents

Board of Director's Orientation Manual

I. INTRODUCTION

This manual has two parts: first, a general introduction to the structure, committees, and activities of the Graduate Students' Association of Wilfrid Laurier University (GSA), and the second part outlines the specific role, duties, responsibilities and expectations of the various directors.

This is an orientation manual and, although it can serve as a reference tool, should not be considered a substitute for the *GSA By-Laws and Policies Manual* **nor the** *GSA Constitution.* Directors are expected to familiarize themselves with this Manual and the aforementioned documents.

II. GENERAL HISTORY OF THE GSA

The Wilfrid Laurier University Graduate Students Society was born in 1985. The purpose of the Graduate Students Society was three fold: to foster graduate student community spirit through academic and social functions; to provide graduate student representation within the academic community; and act as a forum for the discussion of specific graduate student concerns.

Glenn Dormer, who served as the chairperson of the Graduate Students Society, became the first president in 1986 when the Society became what is known today as GSA.

Today's GSA has evolved from a society of the Wilfrid Laurier University Students' Union into an antonymous, incorporated association. The membership of GSA, as outlined in our constitution, encompasses all Wilfrid Laurier graduate students

III. MISSION AND GOALS OF THE GSA

The mission of the GSA is to:

> To enhance the Wilfrid Laurier University graduate students' experiences providing needed representation, services, and resources. Wilfrid Laurier University will strive to fulfill this mission by actively enhancing our partnership with the Laurier community and other student organizations.

Goals of the GSA are to:

- To promote the needs of graduate students;
- To advocate for and be the voice of WLU graduate students to the university administration and outside bodies that students are likely to come into contact with;
- To foster contact and communication among WLU graduate students;

- To provide a forum for graduate students to come together as a unified body on campus to share ideas and generally enhance the graduate experience;
- To represent WLU graduate students within our national and provincial student connections and associations.
- To manage and operate an attractive graduate house

IV. MEMBERSHIP OF THE GSA

For more specific and detailed information refer to the *By-Laws and Policies Manual* and/or the *GSA Constitution*.

The membership of the GSA shall consist of all full and honourary members.

Full Members
Full Members are defined as a full-time or part-time graduate student registered in a graduate program of studies leading to a diploma, certificate, or degree, granted by Wilfrid Laurier University and having paid the full membership fees that are determined from time to time by the BOD. The BOD may, from time to time, assign additional criteria or reduce criteria required for membership.

Honourary Members
The Corporation may bestow Honourary Members from time to time. Al such memberships must be ratified by the BOD. The privileges of honourary members shall be restricted tot he social services of the GSA. All such honourary members shall be listed as such in the membership rolls.

Rights of Members
All members of the Corporation shall be entitled to:
- make reasonable use of the property of the Corporation;
- participate in General and Annual Meetings;
- attend all regular and special meetings of the BOD except those designated by the BOD in the By-Laws;
- enjoy such other privileges as may be conferred in these By-Laws and further enactment of the Corporation;
- vote at all meetings of the Corporation or in a any elections, by-elections, or referenda, propose referenda or recall proceedings in accordance with the By-Laws of the Corporation;
- nominate or second candidates for the BOD as set out in this By-Laws;
- stand for election to hold office for the BOD as set out in this By-Law;
- and participate in any events or activities sponsored by the Corporation or its agents.

Dues

Membership dues shall be payable when Student Administrative Council (SAC) Fees are paid upon registration in a graduate program at Wilfrid Laurier University except in the case of part-time and seminary students whereby fees will be payable upon registration and directly to the Vice President: Finance of the Corporation. The method of collection and amount of the aforesaid dues shall be that which is determined from time to time by the BOD.

V. BOARD OF DIRECTORS

For more specific and detailed information refer to the *By-Laws and Policies Manual* and/or the *GSA Constitution.*

The GSA is governed by a Board of Directors (BOD). The BOD has eleven seats consisting of the president, vice-president finance, vice-president internal affairs, vice-president external affairs, secretary/policy director, communications officer, activities director, committee coordinator, chairperson, and two member-at-large positions. There are also various ex-officio, non-voting, student members who are elected as representatives of the various academic university departments.

University Academic Department Representatives

The graduate students of each university academic department, with a graduate program, elects one student to represent their interests and concerns to the BOD. University Academic Department Representatives also serve as the contact person between the GSA and their respective departments, and inform the students about GSA activities and events.

VI. RESPONSIBILITIES OF THE BOD

For more specific and detailed information refer to the *By-Laws and Policies Manual* and/or the *GSA Constitution.*

As a Director, responsibilities include:
- attending all bi-weekly Board meetings;
- deliberating upon all resolutions presented to the Board;
- representing the views and needs of graduate students;
- participating in committee work where and when possible.

It is expected that all directors of the GSA, in exercising their powers and discharging their duties, shall act with the highest level of integrity, mutual respect, honesty, and in good faith representing the best interests of the Corporation and its members.

All positions serve from May 1, of one year to April 30, of the following year. Time required for each position will vary (with most time required of President and VP

positions). Board members have regular bi-weekly meetings and are expected to participate in daylong workshops in the fall and in winter terms. All Board members are responsible for holding two office hours a week and contributing to GSA newsletters.

VII. REGULAR MEETINGS FO THE BOD

For more specific and detailed information refer to the *By-Laws and Policies Manual* and/or the *GSA Constitution*.

Openness
All meetings of the BOD shall be open to the members of the Corporation and no member shall be excluded therefrom except for improper conduct or except as provided hereinafter. Non-members of the Board of Directors may be heard if recognized by the Chairperson of by one-third (1/3) vote of the Directors present.

At any meeting of the BOD where matters of a confidential or personal nature are being considered, a motion must designate the meeting as closed or "in camera" to any person other than the Directors of the Board and must be approved by three-quarters (3/4) of the members present. The Chairperson prior to the meeting being closed must give open justification for the motion.

Duties of Directors
Each Director shall report on the activities, proceedings, and policies of the Corporation to the members of the Corporation and ascertain their views and assist in the coordination of their participation. Each Director shall undertake such other responsibilities as may be delegated to him/her by the Board of Directors from time to time.

Quorum
One third (1/3) of the current Board comprising at least four (4) Directors, including proxies, shall form a quorum for the transaction of business.

Proxies
No Director may hold more than one (1) proxy from other Directors at any Board meeting.

Minutes of Meetings
A record of the proceeding of all meetings of the Board shall be kept in a book provided for that purpose and the Minutes of all such meetings shall be available to the members of the Board. Minutes shall be posted at the next meeting of the Board. After adoption of by the BOD the Minutes shall be opened to inspection by members of the Corporation at the Head Office during normal business office hours of the Corporation.

Resolutions

The GSA shall recognize three types of resolutions: standing motions, policy motions, and directives.

Standing Motions. Standing motions shall serve as operating procedure guidelines for the GSA. Wherein the By-Laws it is specified that the Board determines an operating mechanism from time to time, it shall be determined by standing motion. Standing motions require a simple majority at a general meeting or two-thirds (2/3) majority at a Board meeting to be adopted. Standing motions require seven (7) days notice giving the intention to be eligible for adoption.

Policy Motions. Policy motions shall serve as statements of policy by the GSA. Officers of the GSA shall, when serving in the official capacity, adhere to GSA policy. Policy motions require a simple majority at a general meeting or two-thirds (2/3) majority at a Board meeting to be adopted. Standing motions require seven (7) days notice giving the intention to be eligible for adoption.

Directives. Directives shall be specific tasks given, within their normal duties, to the Officers by the Board or to the Board, within their normal duties, by the membership. The Board can adopt a directive with a simple majority vote at a Board meeting or by a simple majority vote as a General Meeting.

Parliamentary Procedures at a Glance

To Do This: (1)	You Say This:	May You Interrupt The Speaker	Must You Be Seconded	Can the Motion be Debated	Can the Motion be Amended	What vote is Required
Adjourn the Meeting (before all business is complete) (1)	"I move that we adjourn."	No	Yes	No	No	Majority vote required
Recess the Meeting (1)	"I move that we recess until..."	No	Yes	No	Yes	Majority vote required
Complain about noise, room temperature, etc. (1)	"Point of privilege."	Yes	No	No (2)	No	No vote required (3)
Suspend further consideration of something (1)	"I move we table it."	No	Yes	No	Yes	Majority vote required
End debate (1)	"I move the previous question."	No	Yes	Yes	Yes	Two-thirds vote required
Postpone consideration of something (1)	"I move we postpone this mater until..."	No	Yes	Yes	Yes	Two-thirds vote required

Have something studied further (1)	"I move we refer this matter to a committee."	No	Yes	Yes	Yes	Majority vote required
Amend a notion (1)	"I move that this motion be amended by..."	No	Yes	Yes	Yes	Majority vote required
Introduce business (a primary motion) (1)	"I move that..."	No	Yes	Yes	Yes	Majority vote required
Object to procedure or to a personal affront (4)	"Point of order."	Yes	No	No	No	No vote needed, chair decides
Request Information (4)	"Point of information."	If urgent, Yes	No	No	No	No vote required
Ask for a vote by actual count to verify a voice count (4)	"I call for a division of the house."	No (5)	No	No	No	No vote required unless someone objects (6)
Object to considering some undiplomatic or improper matter (4)	"I object to consideration of this question."	Yes	No	No	No	Two-thirds vote required
Take up a matter previously tabled (4)	"I move we take from the table..."	No	Yes	No	No	Majority vote required
Reconsider something already disposed of (4)	"I move we now (or later) reconsider our action relative to..."	Yes	Yes	Debatable if original motion is debatable	No	Majority vote required
Consider something out of its schedule order (4)	"I move we suspend the rules and consider..."	No	Yes	No	No	Two-thirds vote required
Vote on a ruling by the chair (4)	"I appeal the chair's decision."	Yes	Yes	Yes	No	Majority in the negative required to reverse chair's decision.

Table Notes:
(1) These motions or points are listed in established order of precedence. When any one of them is pending, you may not introduce another that's listed as (4), but you may introduce another that's listed as (1).
(2) In this case, any resulting motion is debatable.
(3) Chair decides.
(4) The motions, points and proposals have no established order of precedence. Any of them may be introduced at any time except when the meeting is considering one of the top three matters listed in the chart (motion to adjourn, motion to recess, point of privilege).
(5) But division must be called for before another motion is started.
(6) Then majority vote is required.

VIII. ELECTION OF DIRECTORS

For more specific and detailed information refer to the *By-Laws and Policies Manual* and/or the *GSA Constitution*.

Annual General Meeting
The annual general meeting of the members shall be held at the Head Office of the Corporation, and shall be held within the month of March of each year. At every Annual General Meeting, in addition to any other business that may be transacted, the report of the Directors and the financial statement shall be presented, as well as a BOD elected for the ensuing year. The members may consider ant transact at any meeting of members any business either special of general for which notice has been given.

Qualification
Each director shall be eighteen (18) or more years of age and shall be a member of the GSA.

Election Date
The election date for Directors will proceed according to Annual General Meeting held in March.

Election Procedures
The election of Directors will proceed according to the procedures detailed in By-Laws of the Corporation.

Term of Office for Directors.
The normal term of office for Directors is from May 1 until April 30 the following year.

Removal of Directors
The members of the Corporation may, by resolution passed with a two-thirds (2/3/) majority at a general meeting of which notice specifying the intention to remove a certain Director, remove a Director of the Board. Any Director absent from three consecutive

Board meetings without apologies, or five consecutive Board meetings with or without apologies is deemed to have resigned. Exceptional circumstances may be reviewed by the Board, from time to time, in cases where a Director is deemed to have resigned, and exemption from this By-Law provision is granted by a simply majority vote.

Vacancies

The Board may fill vacancies of the BOD, however caused, for the reminder of the term of office, if quorum remains. Such vacancies may be filled by the Directors from amongst the members of the Corporation as the Board sees fit. If quorum does not remain, a general meeting must be called to fill the vacancies for the reminder of the term.

IX. OFFICERS OF THE CORPORATION

For more specific and detailed information refer to the *By-Laws and Policies Manual* and/or the *GSA Constitution*.

Officers of the Corporation

There shall be a President, Vice-President: Internal Affairs, Vice-President: External Affairs, Vice-President: Finance, and Secretary to serve as elected Officers of the Corporation. Collectively, these officers are the Executive members. In addition, a Chairperson shall be elected to serve the duties of the Chair. Members of the Executive are prohibited from serving as Chair.

Removal of President, Vice-Presidents, Secretary, or Chair

The members of the Corporation may, by resolution passed by at least two-thirds (2/3) of the votes cast at a BOD meeting at which fifty percent of the Directors are present, and for which notice specifying the intention to pass such motion of the Corporation has been given, before the expiration of his/her term of office remove the President, any Vice-President, Secretary, or Chair from office.

Duties of the President   *Remuneration $700 per term*

- The president as the chief executive officer of the corporation is charged with full responsibility for carrying out legislation, policies, By-Laws, regulations, and resolutions of the Corporation.
- The President in conjunction with the Vice-President shall regularly consult with the officers of all other Wilfrid Laurier University Institutions in order to communicate the activities of the Corporation and to obtain information on changes in such institutional policies and activities.
- The President shall coordinate the activities of the operational bodies of the Corporation and, unless otherwise specified, be responsible to report on the operational bodies at each meeting of the BOD.
- The President shall participate in the appointment of the officers of the Corporation as hereto specified.
- The President shall represent the Corporation at official functions and public occasions.

- The President shall ensure the development of long term goals, priorities and policies of the Corporation.
- The President, the three (3) Vice-Presidents and Secretary shall sign all By-Laws.
- The President shall have such additional powers as are provided for herein, or as from time to time may be conferred upon or may be assigned by the BOD.

Duties of the Vice-President: Internal Affairs   *Remuneration $400 per term*

- The Vice-President: Internal Affairs shall exercise power and be charged with the duties of the President in the extended absence of the latter, or when a vacancy in the Presidency exists.
- In the absence or the liability of the President, the Vice-President: Internal Affairs shall perform the duties of the President.
- The Vice-President: Internal Affairs shall have cosigning responsibilities.
- The Vice-President: Internal Affairs shall, through the Committee Coordinator, be charged with the establishment and maintenance of liaison and communication with graduate students of Wilfrid Laurier University.
- In connection with the President, the Vice-President: Internal Affairs shall be responsible for internal communication with the university committees and student bodies with graduate representation for which no established channels of communication exist.
- The Vice-President: Internal Affairs shall be responsible through the editor, for the regular publication of a graduate Student Association newsletter, if appropriate as determined by the Vice-President: Internal Affairs shall be responsible through an editor, for the yearly publication of a Graduate Student Association Handbook to be distributed at registration in September, if appropriate as determined by the Vice-President Finance.
- The Vice-President: Internal Affairs shall, through the Committee Coordinator, maintain a complete list of graduate students on university committees, and maintain graduate members on these committees.
- It shall be the responsibility of the Vice-President: Internal Affairs to maintain, through the Committee Coordinator, communications between these committees and the BOD of the GSA.
- The Vice-President: Internal Affairs shall be generally responsible for Graduate Student Association memberships.
- The Vice-President: Internal Affairs shall have such additional duties as are provided herein, or as from time to time may be conferred upon or may be assigned by the BOD.

Duties of the Vice-President: External Affairs   *Remuneration $400 per term*

- The Vice-President: External Affairs shall be charged with the responsibility to establish and maintain communication with University students' associations external to Wilfrid Laurier University.
- This shall include the Canadian Federation of Students – Ontario Chapter (CFS-O), Ontario Graduate Association (OGA), Canadian Federation of Students (CFS), and

National Graduate Council (NGC), or their successors and all graduate student associations.

- The Vice-President: External Affairs shall report to the Board on all matters that pertain to his/her duties and shall be responsible to the Board.
- The Vice-President: External Affairs shall represent Wilfrid Laurier University GSA to the external community in conjunction with the President.

Duties of the Vice-President: Finance   *Remuneration $400 per term*

- The Vice-President: Finance shall ensure that the finances of the Corporation are in order and handled in a responsible manner.
- The financial matters concerning the Corporation and prepare and present an annual written financial statement to the BOD as well as a monthly statement of income and expenses, or any such additional written financial statements as the BOD may from time to time request.
- The Vice-President: Finance shall ensure the keeping of the permanent and accurate records of all financial transactions of the Corporation and that all departments are operating within the limitations of the budgets approved by the BOD.
- The Vice-President: Finance shall coordinate the preparation and presentation of budgets to the BOD for approval, as well as being responsible for the holding and dispensing of petty cash funds.
- The Vice-President: Finance shall have such additional duties as are provided for herein, or as from time to time may be conferred upon or may be assigned by the BOD.

Duties of the Secretary   *Remuneration $250 per term*

- The Secretary shall be charged with the general management and supervision of the business offices and personnel of the Corporation.
- The Secretary shall be responsible for all matters pertaining to the maintenance of the letters patent, By-Laws, and resolutions of the Corporation.
- The Secretary shall give notices required to members and to directors.
- The Secretary shall be the custodian of the Seal of the Corporation and of all books, papers, records, minutes, correspondence, contracts, and other documents belonging to the Corporation which he/she shall deliver up only when authorized by a resolution of the BOD to do so and to such persons as may named in the resolution.
- The Secretary will be responsible for the organization and maintenance of the Wilfrid Laurier University Graduate Students' Association Inc. Archives if any exists.
- The Secretary shall have such additional duties as are provided for herein, or as from time to time may be conferred upon or may be assigned by the BOD.

Duties of the Chairperson   *Stipend $100 per semester*

- The chair shall preside, without voice and without vote, except in the case of a tie, over all Board and general meetings of members, as well as other meetings assigned to from time to time by the Board of Directors.
- The Chair shall fix the date, time, place and agenda of all meetings, Board or General, in consultation with the officers of the Board.

- The Chairperson shall ensure that all routine items of the Board business are discussed by the Board and that all agenda items are disposed of at all Corporation meetings over which he/she presides.

Duties of the Communications Officer   *Stipend $300 per semester*
- The Communications Officer is responsible for creating a graduate student e-mail lists each September.
- The Communications Officer shall develop and maintain the GSA Web Page to accurately reflect all up-to-date information of the Corporation.
- The Communications Officer shall be responsible for the regular publication of a graduate Student Association newsletter.
- The Communications Officer shall keep accurate records of all his/her financial transactions and report all financial transactions to the Vice-President: Finance.
- The Communications Officer shall assist the Vice-President: Internal Affairs with the establishment and maintenance of liaison and communication with graduate students of Wilfrid Laurier University.

Duties of the Activities Director   *Stipend $300 per semester*
- The Activities Director is responsible for organizing social events, once a month, throughout the year
- The Activities Director shall work closely with the manager of the Grad House to help organize and publicize events.
- The Activities Director shall keep accurate records of all his/her financial transactions and report all financial transactions to the Vice-President: Finance.

Committee Coordinator   *No stipend paid*
- The Committee Coordinator is responsible for recruiting graduate students to sit on various University Committees.
- The Committee Coordinator will communicate with graduate committee representatives and bring back important information to the GSA Board. The bulk of time commitment for this position occurs in the fall, as committees get started.
- The Committee Coordinator shall assist the Vice-President: Internal Affairs to maintain a complete list of graduate students on university committees, and maintain graduate members on these committees.
- The Committee Coordinator shall assist the Vice-President: Internal Affairs to maintain communications between these committees and the BOD of the GSA.

X. SERVICES AND RESOURCES OF THE GSA

Supplementary Medical Insurance

TO BE INCLUDED.

Assistance for Student Attending Conferences

This Assistance for Students Attending Conferences (ASAC) is available to full-time graduate students only. Students attending a conference are eligible for $100 and those presenting at a conference are eligible for $250. You need apply for reimbursement after having attended the conference by completing an application. Application forms can be picked up and returned from/to the GSA Board at the Grad House, and must include original receipts. ASAC is a "last resort" funding account. Application MUST first apply to their department/faculty and the Office of Graduate Studies before applying to the GSA. Students can only receive funding for two conferences throughout a Masters program and four conferences through a Doctoral program, with a maximum of one conference in any given semester. Depending on the number of applications, the full amount of reimbursement can vary above or below the pre-determined amounts of $100 or $250. Eligibility period and application deadline is as follows:

Eligibility Period	Deadline
September 1st – December 31st	March 1st
January 1st – April 30th	July 1st
May 1st – August 31st	November 1st

Ray Owens Bursary

All graduate students are eligible to apply for this $500 bursary which is awarded once a year. WLU bursary applications are available from the Student Awards office beginning in November of each year. Complete this application indicating yon the top that you are interested in the "RAY OWEN'S BURSARY" and attach a short summary of your extra-curricular activities both within and outside WLU. The applications are due back to the Student Awards office by the last day of the fall semester. The GSA Board will make a decision and successful recipient(s) will be informed by the third week of January.

Externship Assistance

If you are a full-time graduate student and plan on pursuing academic research and/or work terms external to the university, you may be eligible for up to $300. In order to apply, pick up an application from the GSA Board at the Grad House, and prepare a one-page formal proposal outlining the goals and objectives of the endeavor along with a budget. Return the completed application to the GSA Board. This externship is also considered a "financial source" for funding. Externship recipients are asked to submit an article based on their research findings to be published in the GSA "Gradvocate." Eligibility period and application deadline is as follows:

Eligibility Period	Deadline
June 1st – October 31st	June 1st
November 1st – May 31st	November 1st

Special Events Funding
The 15th of each month marks the deadline date for applications for Special Events Funding. Students are eligible to receive $100 towards an event they have planned that contributes to the academic life or student life of graduate students at WLU.

INTRODUCTION TO THE GRAD HOUSE OPERATIONS

General Operating Procedures – Policies - Guidelines

Facility description:
The Graduate Students' Association occupies, through an operating procedures agreement (O.P.A.), the property known to the University community as 22 Bricker Avenue.

The house is comprised of approximately 3400 square feet of usable space resting on land that is controlled and owned by the University. The building was constructed in the summer of 1997 and was opened for use in January of 1998.

Operating Procedures Agreement:
The O.P.A. includes specific information on Food Services, Student Discipline, Liquor License, and the GSA's financial relationship with the University. It is critical that the following general operating procedures, policies, and guidelines be amended and applied in accordance with the spirit of the relationship established in the O.P.A.

In addition to operating procedures, the building's mortgage commitment is contained in the O.P.A.

Hours of operation:
The House Manager, through consultation with the President and/or the Board of Directors establishes hours of operation. It should be noted that adjustments are generally implemented for holiday and examination periods. The current hours of operation are as follows:

Fall – Winter:		Summer:	
MO	11 a.m. to 4 p.m.	MO	Closed
TU	11 a.m. to 4 p.m.	TU	11 a.m. to 4 p.m.
WE	11 a.m. to 2 a.m.	WE	11 a.m. to 2 a.m.
TH	11 a.m. to 2 a.m.	TH	11 a.m. to 2 a.m.
FR	11 a.m. to 7 p.m.	FR	11 a.m. to 7 p.m.

Building booking procedures:
In general, bookings are handled through the bar operations through contacting the pub either in person or by telephone (extension 3155). The following parameters shall be considered when a request for a booking is made:

1) Requests by students enrolled in a graduate program shall be considered a priority.
2) If the request for a booking is beyond the normal hours of operation or requires service beyond what is standard, a special charge shall be applied to the appropriate party. Note: the GSA Board of Directors are exempt from this policy.
3) Special requests involving the Pub and liquor services shall adhere to the policy on Pub bookings.
4) It is understood that non-Laurier community related bookings will adhere to the appropriate University policies and procedures.

Liquor license:

The Liquor License in the Grad House is the result of negotiations and a working relationship with the University. The Liquor License is the property of WLU and is administered by the Office of Finance and Administration. It is critical to consider the following:

1) The use of the liquor license involves three primary parties, WLU, WLUSU and WLUGSA. Any liquor license infractions affects all three parties equally. It is essential that WLUGSA conducts its sale of alcohol in strict accordance to the Province of Ontario's liquor service legislation and related University policies. The suspension or loss of the liquor license would include serious financial repercussions for the student governments and substantial credibility problems within the University community.
2) The liquor license is the property of WLU and is currently in the name of Robert Byron, Executive Director of Finance and Administration. Requests for amendments or changes to the license relating to the Graduate House must be made in writing to the Office of the Executive Director of Finance and Administration.
3) WLUGSA shares an equal voice in the management of the University's liquor license and maintains two seats on the University's Alcohol on Campus Committee (one designated for the President, one designated for the Manager: Graduate House). Representation is critical and the committee expects of one another – the responsible and timely reporting of information relating to the sale of alcohol on campus.
4) WLU security services has the right at any time to suspend the sale of liquor in the Graduate House if there evidence that an Ontario law or University policy has been broken.
5) A current copy of the University's liquor license must be posted in an evident location at all times.
6) The Graduate House's bar operations policy must be posted in an evident location at all times.
7) The Pub's hours of operation must be posted in an evident location at all times.
8) Student discipline relating to incidents that occur as a result of Grad House Pub patronage must be reported to the Dean's Advisory Council (in accordance with WLUGSA's operating procedures agreement).

Smoking policy:
The Board of Directors passed a motion in the winter term of 1998 that the Graduate House would be non-smoking, inclusive of all rooms, offices, and common areas. It was further agreed that smoking is permitted for patrons and guests on the North upper and lower patios and the South front porch. Changes to the smoking policy should be reviewed and approved by the Board of Directors.

EVACUATION & EMERGENCY PROCEDURES:

Fire Emergency Procedures:
It is the responsibility of all primary building users to familiarize themselves with the location of fire exits and fire extinguishers in the Grad House.

Should the fire alarm sound during bar hours of operation, it is the responsibility of the bar staff to:

1) Notify WLU security services immediately.
2) Do not attempt to extinguish the fire unless it is localized, such as in a waste basket, etc.
3) Close the door behind you to any room involved in a fire.
4) With personal safety in mind, guide the safe evacuation of the building.
5) Ensure that those evacuated from the building are moved to a suitable distance from the structure.
6) Await instructions from WLU security services prior to re-entering the building.
7) Draft a brief report on the incident with specifics on date, time, actions taken, and an indication of the cause of the alarm. This document will be kept on file with the Manager: Graduate House.

Power Failure:
In the event of a power failure in the building, immediately notify Physical Resources at extension 6280. After hours or on weekends, call WLU Security Services at extension 3333.

Natural Gas Leak:
1) Cease all operations immediately.
2) Do not switch lights or any other electrical equipment on or off. Electrical arcing can trigger an explosion.
3) Immediately evacuate the area.
4) Notify WLU Security Services at extension 3333.

Bomb Threats:
Follow the University's emergency response guidelines located at the back of an inter-office phone directory (red section – page 5).

FACILITIES & SECURITY:

The Graduate House has two forms of security. The first is a motion, heat, and sound detection system located throughout the building. This system is monitored 24 hours a day, year round, by Counterforce Alarms. It is activated and deactivated by personal security codes that are processed by the system's computer control panels (located by entrance ways on the upper and lower levels). Entries and exits are logged in the system by date and time. An activated alarm sends a message to WLU security services indicating the location of the unusual motion, sound or heat, and triggers an investigation of the building and source.

The second, is a positive working relationship with WLU security services. It is critical that the Manager of WLU Security Services is updated on a regular basis regarding the building's hours of operation and be notified in a timely fashion of events and activities that are occurring in the building outside of regular hours of operation. WLU security services is responsible for administering all evacuations, emergencies, and safety threats. WLU security services can also serve as a source of information when developing further applicable building policies and procedures.

All requests for alarm system codes and building access must be approved by the President (with the exception of bar staff codes - approved by the Manager: Graduate House).

All requests for building keys must be approved by the President (with the exception of bar staff keys – approved by the Manager: Graduate House).

CLEANING, MAINTENANCE & GROUNDS:

All University property cleaning, maintenance, and grounds work is performed by the department of Physical Plant and Planning. Due to union restrictions, outsourcing is strictly prohibited unless directly authorized by the Assistant Vice President: Physical Resources.

Cleaning is primarily co-ordinated by the Manager of Custodial Services. Cleaning of the building is conducted in accordance with the Cleaning contract attached as an appendix to the Operating Procedures Agreement. Questions and concerns regarding cleaning should be directed to the Manager: Graduate House.

Maintenance and Grounds work is primarily co-ordinated by the Manager of Grounds and Maintenance. Authorization for maintenance requests should be approved and facilitated by the President and/or Manager: Graduate House and adhere to the limitations and directives established in the corporation's annual operating budget. Quotes and project timelines should be requested from Physical Plant and Planning when and where appropriate. Any alterations to the physical structure of the Grad House must be approved by the Assistant Vice President: Physical Resources and be developed within the parameters established by the University's various health and safety policies.

INSURANCE:

The Graduate Students' Association maintains insurance policies for three major areas including the physical structure of the Grad House, building contents, and Director's personal liability.

The primary insurance policy is CURRIE, purchased through the University. This is a central policy that covers the University, the two student associations, student publications, the seminary, and the alumni association. The policy and all related activities are conducted through the Office of the Assistant Vice President: Financial Resources. Claims on building structure and contents should be reported immediately to the Assistant Vice President: Financial Resources where the claim exceeds $10K. (See below for claims under $10K).

Issues relating to claims to the corporation's liability and/or director's personal liability (eg: lawsuit) should be reported immediately to the University President and the University Executive Director of Finance and Administration.

A secondary insurance policy is purchased privately through **Dalton and Associates Incorporated.** This policy reduces the $10K deductible on the building's structure and the building's contents to $1K. Claims on building structure and contents below $10K should be reported to the President and/or Manager: Graduate House in a timely fashion. Is the responsibility of the President and/or Manager: Graduate House to notify Dalton and provide appropriate documentation when requested.

BUILDING DEVELOPMENT:

Major structural changes relating to the physical state of the Graduate House must be approved by the Assistant Vice President: Physical Resources. Basic interior aesthetic changes can be conducted at the directive of the Board of Directors.

Exterior changes relating to the appearance and/or general state of the Graduate House may require additional approval through the University's Presidential Aesthetic Committee. It is critical for positive relationships with the University that a dialogue begin with the University's Assistant Vice President: Physical Resources when exterior changes are being considered.

All building development must be conducted in accordance with related University policies and guidelines.

All building development must be approved and financed in accordance with the GSA Board of Directors.

All major projects should be established with a management function that is governed and directed by a representative of the Graduate Students' Association assigned by the President.

WLU CORPORATE ACCOUNTS:

Authorization for authority on University corporate accounts is assigned by the President of the Association. This must be updated on an annual basis with a record being supplied to the University's Assistant Vice President: Financial Resources.

WLU PURCHASING OFFICE:

WLUGSA utilizes the University's purchasing department for a variety of goods and services. In many instances, the University can purchase items in bulk or has close working relationships with major suppliers that can benefit purchase prices passed along to the GSA. Sample items include:

Company	Products - Services
Ayr Coach Lines	Bus rental
Basics	**Office supplies, furniture, computer supplies**
Bruce Edmeades	Restaurant supplies
Hertz	Van rental

The process for utilizing the University's purchasing department is as follows:
(Note: The current GSA University account signatories are the President and the Manager, Graduate House).

1) If you require quotes for goods or services, a GSA University account signatory must telephone or e-mail the purchasing department with a description of the item and/or service.
2) The purchasing department will respond with a recommended supplier, availability, and a quote. A purchase order (P.O.) form, available from the office of the Grad House Manager, must be completed and signed by a GSA University account signatory.
3) A completed P.O. form should be sent to "Purchasing" – 202 Regina via inter-office mail.
4) Goods and services purchased using this method will arrive with a "WLU packing slip" that contains information relating to the original P.O. This form should be passed along to the G.S.A.'s financial records keeper for audit purposes and cross referencing with University statements.

WLUGSA CORPORATE SIGNING AUTHORITIES:

WLUGSA currently utilizes two business bank accounts with a joint signing authority required from the President and the Manager: Graduate House. The first account is

managed at the Royal Bank and is utilized for all bar operations business activities and on-line point of sale equipment. The second account is managed at the Bank of Montreal and is utilized for Master Card related activities. Specific account information is housed in the Office of the Manger: Graduate House. Request for access is granted through the President of the Association.

XII. GSA REPRESENTATION ON VARIOUS UNIVERSITY COMMITTEES

Senate Committees

a) *Senate Executive Committee*
   Rep: Rolando Inzunza (MA)
   Contact: Dr. Rosehart, ext. 2250
   Time Commitment: Approximately 3 hours per month
   Description: Debate and discuss items to be presented at Senate.

b) *Senate Committee on Computing and Audio Visual Services*
   Rep: Rolando Inzunza (MA)
   Contact: Dr. Ron Craig, ext. 2541
   Time Commitment: Approximately 1 meeting per semester
   Description: Review and examine the policies and priorities of both Computing and Audio Visual Services as they affect the academic life of the university, and make recommendations to Senate thereon.

c) *Senate Cultural Affairs Committee*
   Rep: Jill Carter   (MSW, year 1)
   Contact: Dr. Frank Millerd, ext. 2037
   Time Commitment: Committee met twice in semester one before abolishing the committee.
   Description: The purpose of the committee was to discuss the presence of arts, culture and diversity WLU and to decide how to allocate funds reserved for cultural affairs.

d)   *Senate Examinations and Standing Committee*

           Rep: Undergrad reps filled the spaces usually reserved
           for grads
           Contact: Dr. Frank Millerd, ext. 2037
           Time Commitment: Unknown, estimate four meetings per academic
                                      year.
           Description: Unknown

e)   *Senate Finance Committee*

           Rep: Undergrad reps filled the spaces usually reserved
           for grads
           Contact: Dr. Frank Millerd, ext. 2037
           Time Commitment: Unknown, estimate four meetings per academic
                                      year.
           Description: Unknown

f)   *Senate Library Committee*

           Rep: Victoria Shoemaker   (MBA)
           Contact: Dr. Frank Millerd, ext. 2037
           Time Commitment: Approximately four meetings per year
           Description: To review and examine policies and procedures of the
library as they affect academic life of the university and make
recommendations to the Senate thereon.

g)   *Senate Student Appeals Committee*

           Rep: Undergrad reps filled the spaces usually reserved
                                      for grads
           Contact: Dr. Frank Millerd, ext. 2037
           Time Commitment: Unknown, estimate approximately four meetings
                                      per year
           Description: To examine policies and procedures regarding student
appeals and to recommend response to appeals entered by students with
regard to academic or personal misconduct.

(h)   *Senate Committee on Research and Publications*

           Rep: Edmund Okoree   (MA)
           Contact: Dr. Barry McPherson, ext. 3324
           Time Commitment: Unknown
           Description: Unknown

University Committees

a) *Student Electoral Committee*
Rep: Archie MacKinnon   (MSW)
                        Rolando Inzunza   (MA)
Contact: Dr. Frank Millerd, ext. 2037
Time Commitment: 2-3 meetings throughout the month of March
Description: Oversee the operations of the undergraduate student
                        elections with regards to nominations and voting.

b) *Physical Accessibility Committee*
Rep: Carrie Dawson   (MSW, year 1)
Contact: Judy Bruyn, ext. 3043
Time Commitment: Approximately 2-3 meetings per academic year
Description: Meet to discuss the current state of physical accessibility at
WLU and possibilities for changing/renovating parts of campus to
increase accessibility.

c) *Alcohol on Campus Committee*
Rep: Rolando Inzunza   (MA)
                        Joel Lynn
Contact: Human Resources/Ancillary Services
Time Commitment: Approximately 1 meeting per semester
Description: Review and examine the policies and procedures regarding
alcohol consumption and purchase by students as they affect the academic
life of the university, and make recommendations to Senate thereon.

d) *Aesthetics Committee*
Rep: Jackie Pidduck   (MSW, year 1)
Contact: Beth Harrison, ext. 2443
Time Commitment: Approximately 4 meetings per academic year.
Description: Meet to discuss aesthetic changes and additions to WLU.
Major agenda item this year was the construction of a new residence
building and addition to an existing one.

e) *Library Fines Appeals Committee*
Rep: Archie MacKinnon   (MSW)
Contact: Cindy Pierce, ext. 3414
Time Commitment: Unknown
Description: Discuss and rule on appeals made by students with
                        regards to library fines.

f)   *Graduate Faculty Council*

Rep:	Marie Morrison (MSW)
	Isaac Asante (MA)
	Julia Madden (MBA)
Contact:	Dr. Barry McPherson, ext. 3324
Time Commitment:	Approximately 4 meetings per academic year
Description:	Unknown

g)   *Graduate Scholarships, Bursaries and Awards Policy*

Rep:	Linda Isaac (MSW, year 1)
	Isaac Asante (MA)
	Ken Ross (MBA)
Contact:	Dr. Barry McPherson, ext. 3324
Time Commitment:	Approximately 4 meetings per academic year
Description:	To discuss and decide upon policies for distributing scholarships, bursaries and awards to graduate students.

Student Services Advisory Committees

a)   *Student Services Advisory Council*

Rep:	Marie Morrison (MSW)
	Rolando Inzunza (MA)
Contact:	Dean of Students Office
Time Commitment:	Approximately 6-8 meetings per academic year
Description:	To manage and advise on operations and procedures of and changes to all services offered under Student Services. Also takes under advisement recommendations made by Health Services Advisory Committee, Career Services Advisory Committee and Counselling Services Advisory Committee and others in conjunction with the Student Services Operating and Procedures Agreement.

b)   *Health Services Advisory Committee*

Rep:	Marie Morrison (MSW)
	Nancy Snow (MSW)
Contact:	Health Services
Time Commitment:	Approximately 4 meetings per academic year
Description:	To make recommendations regarding operational, procedural and financial conduct as it relates to Health Services.

c)   *Career Services Advisory Committee*

Rep:	Donna Airey
Contact:	Jan Basso, ext. 4137

Time Commitment: Approximately 4 meetings per academic year, although due to a delayed start this year met only once.

Description: To make recommendations regarding the services offered by Career Services and the ways in which those services are offered to students.

d)   *Counselling Services Advisory Committee*

Rep: Kim Kehler (MSW, year 1)

   Deanna Bowen (MSW, year 1)

Contact: Dale Fogle, ext. 2143

Time Commitment: Approximately 4 meetings per academic year

Description: To make recommendations regarding operational, procedural and financial conduct as it relates to Counselling Services.

GSA Committees

a)   *Gradvocate Committee*

Contact: Communications Officer

b)   *Special Events Committee*

Contact: Activities Director

c)   *Grad House Committee*

Contact: President

d)   *Finance Committee*

CONTACT: VP FINANCE

XIII. GSA Board Organizational Chart

President
— Chair Person
— Grad House Manager
— Bar Staff

Vice President Internal Affairs
- Committee Coordinator
- Special Events Coordinator
- Communications Officer
- Health Plan Coordinator

Vice President External Affairs
- External Committee

Vice President Finance
- Finance Committee

Secretary / Policy Director

Member at Large
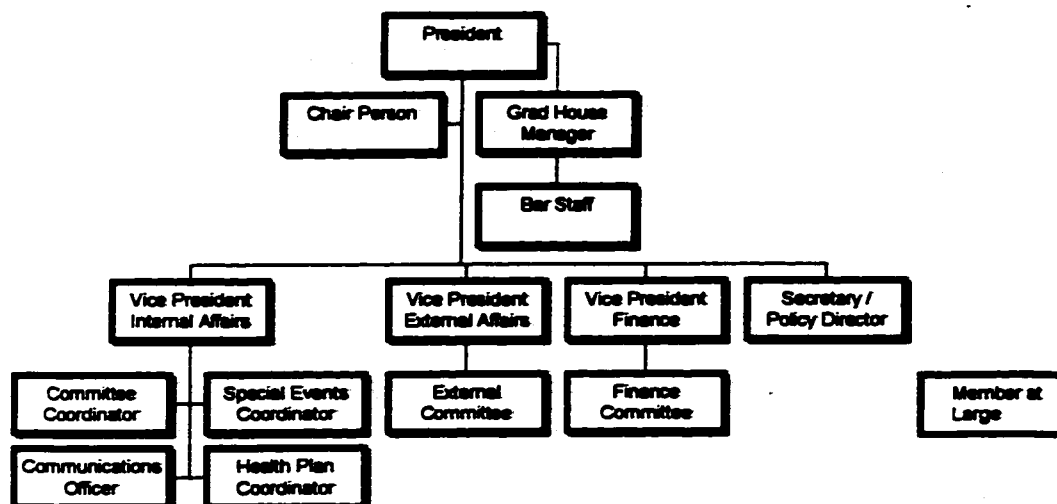
XIV. University Departmental Organizational Chart

Chancellor
John Cleghorn

Board of Governors

Waterloo Lutheran Seminary

Senate

President
Dr. Robert Rosehart

Vice-President: Academic
Dr. Rowland Smith
- Faculty of Arts & Science
  Donald Baker
- School of Business & Economics
  Howard Teall
- Graduate Studies & Research
  Barry McPherson
- Faculty of Music
  Anne Hall
- Faculty of Social Work
  Janneh Mather
- Library
  Virginia Gillham
- Student Services
- Student Services
  David McMurray
- Registrarial Services
  John Metcalfe
- Other

- Director of Academic Projects
  Doug Witmer
- Director, Laurier International
  Alex Murray
- Director of Brantford Project
  Arthur Read
- Director, WLU Press
  Sandra Woolfrey
- Co-ordinator, Academic Relations
  Christine Daly
- Cultural Affairs Co-ord. Dev. Liason Officer
  Deborah Currie

Executive Director: Finance & Administration
Robert Byron
- Financial Resources
  Gary Lambert
- Human Resources
  Philip Wang
- Physical Resources
  Ron Dupuis
- Other

- Security Services
  Peter Jang
- Bookstore/Purple & Gold
  Marjorie Peller

Vice-President: University Advancement
Arthur Stephen
- Development & Alumni Relations
  Pamela Heaney
- Public Affairs
  Pat Zerge
- Liason Services
  Jennifer Casey

- Special Advisor to the President
  Dr. Robin Armstrong
- University Secretary
  Dr. Frank Millerd
- Harassment/Discrimination Co-ordinator
  Marilyn Jacobs
- Ombudsperson
  Dennis Wilfong
- Employment Equity Co-ordinator
  Fran Manson

XV. UNIVERSITY RESOURCE PEOPLE – CONTACT LIST

Department / Title	Name	Phone	Office
Administration			
President	**Dr. Robert G. Rosehart**	**2250**	**P2102**
President's Administrative Assistant	**Beth Harrison**	**2443**	**P2100**
VP: Academic	**Dr. Rowland Smith**	**2221**	**P2104**
VP: Academic's Administrative Assistant	**Roza Cunningham**	**2224**	**P2100**
AVP: Financial Resources / Comptroller	Gary Lambert	6268	R323
Executive Director: Finance & Administration	**Robert Byron**	**2248**	**R244**
Executive Dir's Administrative Assistant	**Kendra Young**	**2480**	**R243A**
Registrar	Dr. John Metcalfe	6092	R210
Special Advisor to the President	Dr. Robin L. Armstrong	3727	3C21
Arts & Science, Faculty of			
Dean	Dr. Donald Baker	3220	5-201
Athletics & Recreation			
Director of Athletics	**Peter Baxter**	**2216**	**AC**
Audio Visual Resources			
Manager	John Durst	3075	2-613
AV Equipment Requests	Science Building	2242	N1052
AV Equipment Requests	Woods Building	3392	2-617
Bookstore			
Manager (acting)	Kathryn Wardropper	3109	Concourse
Business Office			
Manager (acting)	**Pauline Delion**	**4256**	**R228**
Career Services & Co-operative Education			
Director	Jan Basso	4137	K114
Assistant Director	Karen McCragar	4105	K201
Chaplains Office			
Chaplains		2739	SS2-04
Computing and Communication Services			
Director	Dr. Nora Znotinas	3435	1-303A
Manager: User Support	Robert Ellsworth	3120	1-305B
Web Page help	Shiela Pepper	3439	
Counselling Services			
Director	Dr. Dale Fogle	2143	SS2-06

Development and Alumni Relations

VP: University Advancement	Arthur Stephen	3189	AL109
Director	Pamela J. Healey	3173	AL109

Faculty of Social Work

Dean	Dr. Jannah Hurn Mather	2205	A412
Admissions/Registratin	Dale Taylor	2022	A421A

Food Services

Manager	Donna Faulkner	2596	Dining Hall

Graduate Studies

Dean	Dr. Barry D. McPherson	3324	1-504
Administrative Assistant to the Dean	Janet Bannister	3130	1-501
Assistant Dean	Dr. Linda Parker	3126	1-505
Co-ordinator, Graduate Admissions and Records	Helen Paret	3132	1-502
	Diane Duffy	3127	1-501

Harassment/Discrimination Office

Co-ordinator	Marilyn Jacobs	6979	A421B

Health Services

Director	Dr. James Hicks	3146	SS
Manager	Doreen Koenig	3622	SS

Housing

Director	Michael Belanger	3188	MacH111

Human Resources

AVP: Human Resources	Philip Wong	4367	R252
Manager: Payroll	Mary Haffner	6306	R251

Library

University Librarian	Virginia Gillham	3380	L215

Material Management

Manager	Marion Barnaby	6455	R242B
Secretary	Anita Moore	6454	R242B
Purchasing / Buyer	Jennifer Kohli	6457	R242A

Parking Services

Faculty, Staff, and Student Permits		3696	R227C
General Inquiries		6312	R101

Physical Resources

AVP: Physical Resources	**Ron Dupuis**	**6210**	**R101D**
Administrative Assistant/Secretary	Susan Veenstra	6312	R101
Manager: Custodial Services	Mary Basler	3697	30 Bricker
Manager: Facilities Planning, Design & Construction	Robert Vanderspek	6310	R101A

Manager: Maintenance & Grounds Services	john Campell	6283	LDG101
Secretary: Physical Plant & Planning	Kathy Lichti	6280	LDG101

Printing Services

Manager (acting)	Don Doyle	6257	R131
Administrative Assistant	Ann Meinzinger	6427	R131

Purple and Gold

Supervisor	Anne Fay	3551	Concourse

School of Business and Economics

Associate Dean: Academic Programs (Acting Dean)	Dr. Howard Teall	2470	P2008
MBA Director	Dr. Hugh Munro	2556	P3046
MA Business Economics Program Director	Randy Wigle	2438	P3090

Security Services

Manager	Peter Jorg	3710	34 Bricker

Special Needs Office

Co-ordinator	Judy Bruyn	3043	1C11

Student Services

AVP: Student Services / Dean of Students	J. David McMurray	3319	FNCC
Administrative Assistant	Cathie Hughes	3318	FNCC
Associate Dean of Students	Katherine Elliot	3783	FNCC
International Student Advisor	Debbie King	3784	FNCC

University Secretariat

University Secretary	Dr. Frank Millerd	2037	P2094
Administrative Assistant	Whitney Densmore	2047	P2092

Graduate Secretaries

Economics	Cindi Wieg
English	Joanne Buehler-Buchanan
Geography	Trevor Arndt
History	Lynn Doyle
Political Science	Sherry Howse
Pscyhology	Elma Schweigert
Religion & Culture	Mary Romas
FSW	Dale Taylor
MBA	Dianne Hotson
Seminary	Bette Smith

XVI. OFFICE PROCEDURES

Mail

- Outgoing mail (for on or off campus) may be placed in the white mailboxes, across from the pay phone, on the ground level of the building.
- On-campus mail requires only the name and the office of the person you are sending it to on the inter-office envelope. Various sized inter-office envelopes may be found in the top-right filing cabinet.
- In-coming mail will be placed in the top blue basket, labeled incoming mail, on the desk closest to the office door.
- For any business correspondence please use GSA letterhead and envelopes. The letterhead stationary is located in the filing cabinet under the printer, close to the office windows.
- To post mail for off-campus, simply write the GSA code on the top right corner where the stamp would normally go. The university will post the envelope and charge the cost back of postage to the GSA account. The account number for postal services is 5-***-1144-0-0.

Circulation Box

- Any item for the GSA Board to read can be placed in the circulation box for people to read during their office hours or while in the office. The circulation box is the bottom blue basket, labeled circulation box, on the desk closest to the office door.
- Attach a circulation tag on the item (found on desk with pen holder) and place it in the lower blue box on the desk.

Photocopier

- The photocopier is rented to the GSA for Grad House and GSA use. It cost us $.07 a copy. Use at your discretion.
- Large quantities of photocopying should be sent to Printing Services on campus.
- **Personal copies of 10 or less can be made on this copier.**

Fax

- The fax machine is owned by the GSA.
- As faxes come in they should be placed in the appropriate persons mailbox.
- The fax line serves two purposes, it is both a voice and a fax line. For voice the number is (519) 884 – 1970 (ext. 5054). Incoming faxes go to 884-3310. Outgoing off campus faxes - you must dial 9 first then your number (same as you use the meridian voice phone) - On campus faxes simply require the four digit extension number.

Phone

- The phone is on the university's *Meridian Mail* system.
- If there are messages on the phone a light will flash by the message button.
- Phone messages are to be recorded in the phone messages book that will be checked by every board member when they are in the office. Messages should not be left on the phone. .
- No long distance personal calls may be made on the GSA phone without a phone card.
- Long distance phone calls for business are to be logged in the *Long Distance and Photocopy Log Book*.
- See attached *Meridian Mail* system document for instructions on features of the phone.

Computers

- There are two computers in the office. You are welcome to use these computers for personal use PROVIDED NO ONE NEEDS THEM FOR GSA BUSINESS. Bring your own paper for your personal printing needs.
- If you are going to save ANY files please do so under the following directory:

  C:\My Documents\XXXXXXXXXXX

  The XXXXXXX stands for YOUR appropriate directory (depending on your position in the GSA), but the capitalization of letters is not important.

  The reason for this precaution: So files can be very easily backed-up on a weekly basis (it is very convenient if they are in the same place)

E-mail
The GSA has e-mail box that needs to be checked when on your office hours. The procedure is:

1. Bring up the **TERMINAL** window on the "**Desktop**"
2. Using the mouse, go to the FILE menu and then choose (at the bottom of that menu) the **MACH1:23** option.
3. When you are prompted to enter the login name, type **GSA**, when you are prompted for the password, type **gsa1997**
4. Most mail will be for the VP External because of the number of national listserves we are a member of, so if it is appropriate please save them to his/her folder.
   - While reading the e-mail press **S** (this is the save key)
   - When prompted for a folder just type in external
   - Press N to go to the next e-mail message
   - If the mail message is OBVIOUSLY for someone else instead of saving the message to the external folder, just type in its place either:

- President, Internal, Comms, Event, Finance, Chair, Secretary
5. Remember to check and see if there is a folder with mail for you.
    - To do this, if you are reading an e-mail press M, this will get you to the main menu.
    - Choose the **folder list** option
    - Here you will see a list of folders that you can check

Filing
Each executive board member has a section of the filing cabinet.

Petty Cash

The purpose of the petty cash float is to make the transfer of small amounts (less than $20.00) of out of pocket expenses easier and more convenient for GSA BOD members.

To make a claim to petty cash, an expense reimbursement form must be filled-out. This form needs to have information about the name and signature of applicant, date, GSA office, reason, and amount requested.

When possible this expense reimbursement form should be filled out prior to the purchase. The request will be processed and endorsed if appropriate by the VP Finance, or designated executive member. Subsequently a purchase is than made, receipts are submitted, and a reimbursement given to the BOD member. If a purchase is made before approval, reimbursement is subject to the VP Finance's discretion.

Ordering Office Supplies

See section XI. Introduction to the Grad House, sub-section WLU purchasing office for more information.

XVIII. GSA Administrative Operating Budget 1999-2000

INCOME (estimated)		
Admin. Council Fee (Spring)	$	7,665.00
Admin. Council Fee (Fall)	$	12,775.00
Admin. Council Fee (Winter)	$	12,775.00
Health Plan Administration Fee	$	1,750.00
CFS Fees	$	3,500.00
TOTAL INCOME	$	38,465.00
ACCOUNT		
Office Expenses	$	1,000.00
Telephone	$	800.00
Conferences	$	1,500.00
ASAC	$	3,000.00
Externship	$	2,000.00
Ray Owens Bursary	$	500.00
Special Events	$	1,500.00
Remuneration	$	10,050.00
Social Budget	$	2,000.00
Poster (Handbook)	$	-
Publications	$	1,500.00
Professional Services	$	2,000.00
Meetings	$	750.00
Marketing	$	2,000.00
Business Plan (House)	$	1,000.00
Board and Volunteer Appreciation	$	1,000.00
CFS Fee Transfer	$	3,500.00
Health Plan (Buffer)	$	500.00
subtotal	$	34,600.00
Retained	$	3,865.00