

Dalhousie Student Union (herein after “DSU”) in 1985 to assist students in navigating University policies and to finding appropriate resolution to their concerns. The Service is a student-run and student-funded service of the DSU.

1. **MANDATE AND SCOPE**

The mandate of the Service is to help students of Dalhousie University (herein after “Dalhousie”) and The University of King’s College (hereinafter referred to as “King’s”) navigate University policies and to receive fair and reasonable decisions on issues dealing with academic appeal and disciplinary matters, Student Code of Conduct violations/complaints, discrimination and harassment complaints and any other matter involving University discipline or complaint processes.

2. **PRINCIPLES**

The general and fundamental principles held by the Service include confidentiality, anti-oppression and survivor-centered practice, inclusivity, professionalism and honesty. These principles shall be reflected in the conduct and performance of duties by advocates of the Service.

3. **RELATION TO THE OFFICE OF THE OMBUDSPERSON**

The Service recognizes the importance of cooperation with the Office of the Ombudsperson. Therefore:

- 3.1 Whenever possible, the Service shall cooperate with the Ombudsperson to provide the best possible assistance to students.
- 3.2 The Service may receive all cases referred to it by the Ombudsperson and determine how best to assist the student.
- 3.3 The Service shall only take cases consistent with its mandate. All other cases shall be referred to the Ombudsperson or another appropriate service.
- 3.4 The Executive Director (External) will be responsible for maintaining good relations and open communication with the Ombudsperson.

4. **FUNCTIONS**

The Service has seven (7) primary functions: information and referral, advice, informal resolution, submissions, outreach and education, policy review and revision and advocacy.

4.1 *Information and Referral*

The Service endeavors to provide information to students regarding Dalhousie academic and disciplinary policies, Student Code of Conduct policies and resolution practices, and harassment and discrimination policies and processes. As well, public awareness campaigns concerning issues such as plagiarism, the Dalhousie Student Code of Conduct, and student rights and responsibilities are undertaken to educate the student body.

Students who request information or guidance outside of the mandate of the Service shall

be referred to an appropriate campus or community service.

4.2 *Advice*

Advocates shall provide students with guidance concerning how to effectively manage their situation. Advice shall be related to procedural matters and submission preparation. **At no time shall Advocates dispense or attempt to dispense legal advice.**

4.3 *Informal Resolution*

Informal resolution of a student's situation is always sought first by Advocates where applicable. The Service is committed to attempting informal resolution as the most efficient way of serving our clients.

4.4 *Submissions*

Advocates assist students with the preparation of their submissions for hearings as applicable. Students are informed as to what is best to include in their submission and how to formulate an argument. Advocates endeavour to aid students in presenting their situation as clearly and concisely as possible.

4.5 *Advocacy*

The Service provides Advocates in a supporting role to attend hearings/meetings with students. Advocates aid students by making suggestions concerning oral statements and potential questions of committee members. Advocates will encourage and support students to present their own case but will be available to make submissions if the student so desires/requires. Advocates assist at hearings/meetings by asking clarification questions, providing support to the student, and ensuring that the process is conducted according to the relevant policies/terms of reference for the committee in question.

Advocates normally present arguments on behalf of their clients:

- a) at advanced levels of appeal;
- b) if the student lacks a strong command of English;
- c) if the student cannot attend the hearing/meeting; and/or,
- d) if the student desires.

5. **CONFIDENTIALITY**

The Service is committed to ensuring the highest level of confidentiality concerning all information and matters discussed between students and advocates. Federal and provincial privacy laws shall be adhered to, and student records shall not be released by the Service unless subpoenaed by a Court of Law to do so.

Advocates shall sign an Advocate Code of Ethics which, among other things, outlines their confidentiality requirements to students who utilize the Service.

The Service shall have in place a records management policy to ensure that files are kept secure and that only needed information is retained in the archives. Case files shall be retained for no longer than five (5) years from the case closure date.

6. **STRUCTURE**

The Service operates with an Executive Director External, Executive Director Internal, a Policy Coordinator, an Education/Outreach Coordinator, a Summer Director, an Assistant Summer Director (when relevant) and volunteer Advocates.

- 6.1 The Executive Director External shall provide general management for the Service.
- 6.2 The Executive Director External shall be assisted by the Executive Director Internal and two Coordinators
- 6.3 During the summer months, the Executive Director External shall have the option of either full-time employment with the service, or part-time employment of 10 hrs/week for managerial duties only.
- 6.4 If the Executive Director External elects to work full-time in the summer they will be assisted by a full-time Summer Director.
- 6.5 If the Executive Director External elects to work part-time in the summer they will be assisted by a full-time Summer Director and a full-time Assistant Summer Director.

7. **FINANCES**

Each year, the Service shall be allocated funds by the DSU. Financial responsibility of the Service shall be maintained by the Finance Committee. The Finance committee is to be composed of two executive members and two Advocates. The Executive Director External shall chair the committee. Decisions will be made through consensus. In the event that a consensus cannot be reached, majority vote will rule. At all times this group shall determine how to best utilize the funds to meet the objectives of the Service.

8. **REVISIONS TO THE TERMS OF REFERENCE**

The Terms of Reference for the Service shall be effective as of April 1, 2017. All previous Terms of Reference and Constitutions are superseded by this document.

The DSU shall review this document every year to ensure that the Service continues to meet the needs of students and the Union. The DSAS Executive have the ability to review this document at any times and make such changes that they deem necessary with agreement of the VPAAE and Council.

DALHOUSIE STUDENT ADVOCACY SERVICE OPERATING POLICIES

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Dalhousie Student Advocacy Service
Operational Policies
Definitions

1. “Academic Term” means a segment of the year when Students are registered at the University.
2. “Advocate” means Students who volunteer with the Service.
3. “Advocate Code of Ethics” means the Dalhousie Student Advocacy Service Advocate Code of Ethics.
4. “Case” means the work performed by Advocates to assist Clients.
5. “Client” means a Student who utilizes the Service.
6. “Code of Student Conduct” means the Dalhousie University Code of Student Conduct.
7. “Coordinators” means the Executive members of the Service.
8. “Dean” means the chief academic officer of a Faculty.
9. “DSU” means the Dalhousie Student Union.
10. “DSU Constitution” means The Constitution of the Dalhousie Student Union.
11. “Executive Director External” means the Executive Director of the Service.
12. “Faculty” means an academic unit of the University.
13. “Member” means the combination of Advocates, the Executive Directors, and the Assistant Directors.
14. “Office” means the office space utilized by the Service.
15. “Ombudsperson” means the Ombudsperson of the University.
16. “Operating Policies” means the Dalhousie Student Advocacy Service Operating Policies.
17. “Summer Director” means an advocate hired to assist the Executive Director of the Service in the spring and summer Academic Terms.
18. “Service” or “DSAS” means the Dalhousie Student Advocacy Service.
19. “Student” means any full-time or part-time student as defined by the University.

20. “Terms of Reference” means the Terms of Reference, Dalhousie Student Advocacy Service.
21. “University” means all campuses of Dalhousie University and/or The University of King’s College, Nova Scotia, Canada.
22. “Vice-Provost Student Affairs” means the Vice-Provost Student Affairs of the University.
23. “Volunteer” – A student who volunteers with the Service in any capacity.
24. “VP AE” means the Vice-President (Academic External) of the DSU.
25. “VP (Finance and Operations)” means the Vice-President (Finance and Operations) of the DSU.
26. In these policies, unless the context requires otherwise, words importing the singular number shall include the plural number, and words importing one gender shall include all genders.

Operational Policies

Policy 1: Relationship with the Dalhousie Student Union

Effective: September 1, 2005

Amended: April 1, 2017

- 1.1 The Service was created in 1985 by the DSU. The DSU council provides DSAS as a service for Students of the University and maintains organizational and financial oversight of the Service.
- 1.2 The VP Academic External is responsible for the overall management of DSAS through the Executive Director External.
- 1.3 Each year, the DSU provides finances and office space for DSAS.
- 1.4 The VP Academic External shall ensure that DSAS remains an arms-length service of the DSU by overseeing the Executive Director External. Concerns or suggestions regarding DSAS are relayed to the Executive Director External who will make the needed changes.
- 1.5 Members of the Service are covered under the DSU's insurance.

Operational Policies

Policy 2: Advocate Code of Ethics

Effective: September 1, 2005

Amended: April 1, 2017

- 2.1 Each year, the Advocate Code of Ethics shall be examined by the Executive Team to determine needed updates.
- 2.2 During Advocate training in the fall, the Advocate Code of Ethics shall be presented to all incoming and returning Advocates. The Advocate Code of Ethics shall be overviewed broadly, and each Advocate shall read and sign the Advocate Code of Ethics. An Advocate's signature indicates that they have read the Advocate Code of Ethics and agrees to abide by its principles.
- 2.3 No Member shall be required to engage in activities or Cases that compromise their moral and/or religious beliefs.
- 2.4 No Member shall be required to participate in Code of Student Conduct Cases, especially those involving sexual content.
- 2.5 A copy of the Advocate Code of Ethics forms shall be publicly posted in the DSAS office so that Students are aware of the Service's commitment to the principles of confidentiality, anti-oppression and survivor-centered practice, inclusivity, professionalism and honesty.
- 2.6 All executive members shall also sign the Advocate Code of Ethics.

Operational Policies

Policy 3: Communications with Clients

Effective: September 1, 2005

Amended: April 1, 2017

- 3.1 Advocates shall endeavour to meet with Clients in person as frequently as needed to ensure proper communication and assistance.
- 3.2 When assigned a Case, advocates shall make first contact with their Client within 24 hours.
- 3.2 If a Client will be out of the province during times of needed contact, Advocates shall attempt to communicate through email or Skype as much as possible.
- 3.3 When emailing with Clients, advocates shall only use their official Dalhousie email address.

Operational Policies

Policy 4: Withdrawal of Services

Effective: September 1, 2005

Amended: April 1, 2017

- 4.1 Advocates shall not withdraw their services from a Client except for good cause and upon written notice to the Client, following consultation with the Executive Team.
- 4.2 Good cause shall include but not be restricted to:
 - a. Inappropriate conduct by the Client that negatively impacts the trust and confidence that an Advocate has in the Client;
 - b. A conflict of interest that arises;
 - c. Exhaustion of all reasonable actions; and/or
 - d. Circumstances that prevent the Advocate from serving the Client to the best of their abilities.
- 4.3 Advocates may be required to withdraw their services if the Executive Team believes that a conflict of interest exists, a complaint has been brought against the Advocate, the Advocate has demonstrated problematic behaviour, or if other circumstances prevent the Client from receiving adequate representation.

Dalhousie Student Advocacy Service
Operating Policies

Policy 5: Privacy

Effective: September 1, 2005

Amended: April 1, 2017

- 5.1 Advocates are committed to maintaining Client confidentiality and shall not discuss the particulars of present or past Cases with those outside the Service.
- 5.2 The Service shall only retain in a Client's file notes, correspondence, submissions/appeals, or other documents relevant to a clients Case.
- 5.3 If items are removed from a Client's file, the person removing the item shall place a note in the file to state what documents were removed. The note shall be signed and dated.
- 5.4 The Service is entitled to retain copies of all documents in a Client's file including those provided by the Client.
- 5.5 A Client is entitled to have a copy of any of the documents in their file.
- 5.6 A Client is entitled to have original documents belonging to them returned upon their request. These documents do not include:
 - a. Notes taken by the Advocate(s);
 - b. Forms of the Service signed by the Client; and
 - c. Documents carbon-copied to the Advocate or the Service.
- 5.7 The Service shall retain files for no more than 5 years and following that time period shall ensure that files are appropriately shredded.
- 5.8 Non-identifying information will be added to the DSAS database as necessary to track cases, outcomes and statistics.

Dalhousie Student Advocacy Service
Operating Policies

Policy 6: Revisions to the Operating Policies

Effective: September 1, 2005

Amended: April 1, 2017

- 6.1 In October of every year, the Executive Director External shall make available the Operating Policies to members of the Service to review and ensure they remain up-to-date and current with the way the Service operates.
- 6.2 As needed, proposed changes shall be recommended by the Executive Director External to the VPAAE and DSU Council for their approval and consent. New policies shall be created in a similar fashion.
- 6.3 Upon the acceptance of changes to a policy, a date of amendment shall be affixed to indicate its supersession of the previous policy.

Dalhousie Student Advocacy Service
Operational Policies

Policy 7: Duties of the Executive Directors

Effective: September 1, 2005 Amended: April 1, 2017

- 7.1 The Executive Director External shall:
- a. Administer the Service on behalf of the DSU;
 - b. Liaise with the VPAAE concerning administrative and academic issues;
 - c. Serve as the liaison between the Service, the University, and the Ombudsperson;
 - d. Meet regularly with the Ombudsperson to keep them apprised of systemic issues and ongoing Cases of note;
 - e. Communicate with members of the University including (but not limited to): Vice Provost Student Affairs, Faculty Deans, AIOs, Student Conflict Office, Office of the Ombudsperson, Human Rights and Equity Services;
 - f. Provide support to the Executive members and Advocates;
 - g. Assist the Executive Director Internal in managing the DSAS email inbox and assign Cases as necessary;
 - h. Facilitate opportunities for external support for Advocates (de-briefs, counselling, etc.);
 - i. Take Cases only as the need arises;
 - j. Chair the Finance Committee and be responsible for recruiting members of the Finance Committee;
 - k. Ensure the Service operates according to its Terms of Reference and Operational Policies;
 - l. Have the ability to delegate duties and/or responsibilities to the other Executive members as needed;
 - m. Be responsible for the training and transitioning of the incoming Executive Director External
 - n. Facilitate a mentoring program for new Advocates and;
 - o. Prepare an annual report on the operations of the Service to be submitted to the DSU no later than April 30th.
- 7.2 The term of employment for the Executive Director External shall be from May 1st until April 30th of the following year.
- 7.3 For the summer term from May 1st to August 31st, the Executive Director External shall have the option to work either:
- a. Thirty-five (35) hours per week subject to University closures and holidays;
or;
 - b. Ten (10) hours per week in which the Executive Director External shall serve in an oversight position over the Summer Director and the Assistant Summer Director.

- 7.4 The Executive Director Internal shall:
- a. Schedule office hours for Advocates and the Exec Team;
 - b. Create and maintain Case assignment schedules;
 - c. Maintain Advocate files:
 - i) case files;
 - ii) personal files, including training opportunities and schedule preferences.
 - d. Support resource development for Advocates.
 - e. Assign Cases to Advocates and continue to manage Cases:
 - i) respond to Client requests, questions and concerns;
 - ii) manage Client needs until completion of the Case;
 - iii) review intakes and create intake folders where appropriate;
 - iv) reassign Cases where appropriate;
 - v) prompt Advocates to close Cases;
 - vi) address conflicts of interest and Client management concerns as they arise;
 - vii) close Cases.
 - f. Liaise with AIOs and the Coordinator of Discipline & Appeals to manage Case volumes;
 - g. Renegotiate Case processes where appropriate;
 - h. Keep statistics:
 - i) track Case progression and results of Cases;
 - ii) keep statistics on types of Cases and relevant information on the student population served.
 - i. Support Advocate training;
 - i) coordinate formal group training;
 - ii) support individualized training and mentorship opportunities
 - iii) provide support to Advocates when complex Case questions arise.
 - j. Manage personal Case load:
 - i) take Cases as the need arises;
 - ii) serve as co-Advocate on complex cases.
 - k. Carry out additional duties as assigned by the Executive Director External;
and
 - j. Prepare an annual report concerning their duties to be submitted to the Executive Director External no later than April 30th.

7.5 The term of employment for the Executive Director Internal shall be from September 1st until April 30th of the following year.

Dalhousie Student Advocacy Service
Operating Policies

Policy 8: Duties of the Coordinators

Effective: September 1, 2005 Amended: April 1, 2017

8.1 The Policy Coordinator shall:

- a. Chair the Policy Committee;
- b. Conduct an annual review of the Terms of Reference and Operating Policies:
 - i) work with the Executive Director External to ensure there is opportunity for Advocate feedback;
 - ii) propose revisions as needed.
- c. Coordinate the creation and implementation of policies and procedures, when relevant;
- d. Liaise with student societies on campus to assist in the creation and revision of their policies;
- e. Be familiar with University policies and procedures;
- f. Identify gaps, inconsistencies or other concerns in the policies, procedures or in their operation;
- g. Assist with Advocate training;
- h. Carry out additional duties as assigned by the Executive Director External;
- i. Prepare an annual report concerning their duties to be submitted to the Executive Director External no later than April 30th.

8.2 The Education and Outreach Coordinator shall:

- a. Chair the Education and Outreach Committee;
- b. Be responsible for the promotion of the Service to Students through available advertising means;
- c. Coordinate the creation and maintenance of education materials:
 - i) workshops on issues such as academic integrity, sexual harassment, accommodation, discrimination, and the Code of Student Conduct.
 - ii) pamphlet guides to policies, including those related to academic integrity, accommodation, sexual harassment, discrimination, and the Code of Student Conduct.
 - iii) update and add to the online platform for policy guides
- d. Coordinate the distribution of outreach materials, including posters and pamphlets.
- e. Work with the DSU Graphics Designer and Communications and Outreach Coordinator where applicable;
- f. Meet and liaise with student societies on campus;

- g. Attend events to stay engaged with on-campus issues;
- h. Help coordinate Advocate recruitment and training;
- i. Carry out additional duties as assigned by the Executive Director External; and
- j. Prepare an annual report concerning their duties to be submitted to the Executive Director External no later than April 30th.

8.3 The Executive Director External shall have the ability to make changes to the duties of the Executive members as needed, with approval of the VPAE to utilize individual strengths and/or experiences, and to ensure effective management of the Service.

8.4 The terms of employment for the Coordinators shall be from September 1st to April 30th of the following year.

Dalhousie Student Advocacy Service
Operating Policies

Policy 9: Duties of the Summer Director(s)

Effective: September 1, 2005 Amended: April 1, 2017

- 9.1 The Summer Director shall:
- a. Be responsible for day-to-day Office administration for the Service during the spring and summer Academic Terms;
 - b. Be responsible to and report regularly to the Executive Director External and the VPAAE of the DSU;
 - c. Staff the office for no less than thirty-five (35) hours per week subject to University closures and holidays;
 - d. Handle Cases and assist Clients;
 - e. Communicate with members of the University including, but not restricted to, the Vice Provost Student Affairs, Deans, AIOs, Student Conflict Office, Human Rights and Equity Services;
 - f. Complete projects determined in cooperation with the Executive Director External and Assistant Summer Director (when relevant);
 - g. Carry out additional duties as assigned by the Executive Director External; and;
 - h. Prepare an annual report concerning their duties to be submitted to the Executive Director External and VPAAE by September 30th.
- 9.2 The terms of employment for the Summer Director shall be from May 1st to August 31st.
- 9.3 For the summer term from May 1st to August 31st, the Executive Director shall have the option to work either:
- a. Thirty-five (35) hours per week subject to University closures and holidays;
or
 - b. Ten (10) hours per week in which the Executive Director shall serve in an oversight position over the Summer Director and the Assistant Summer Director.
- 9.4 The Assistant Summer Director (when relevant) shall:
- a. Be responsible for day-to-day Office administration for the Service during the spring and summer Academic Terms;
 - b. Be responsible to and report regularly to the Summer Director, Executive Director External and the VPAAE of the DSU;
 - c. Staff the office for no less than twenty-five (25) hours per week subject to University closures and holidays;
 - d. Handle Cases and assist Clients;

- e. Communicate with members of the University including, but not restricted to, the Vice Provost Student Affairs, Deans, AIOs, Student Conflict Office, Human Rights and Equity Services;
 - f. Complete projects determined in cooperation with the Executive Director External and Summer Director;
 - g. Carry out additional duties as assigned by the Executive Director External; and
 - h. Prepare an annual report concerning their duties to be submitted to the Executive Director External and VPAE by September 30th.
- 9.5 The terms of employment for the Assistant Summer shall be from May 1st to August 31st.

Dalhousie Student Advocacy Service
Operating Policies

Policy 10: Duties of Advocates[k1]

Effective: September 1, 2005

Amended: April 1, 2017

10.1 Each Advocate shall:

- a. Staff the Office for no fewer than two (2) hours per week subject to University closures and holidays during the fall and winter Academic Terms, when assigned office hours;
- b. Provide advocacy services, advice, referrals to appropriate services, and take Cases as assigned by the Executive Director Internal;
- c. Adhere to the Advocate Code of Ethics;
- d. Make and keep accurate records of actions taken for each Case;
- e. Serve the needs of their Clients to the best of their abilities;
- f. Attend all mandatory training sessions;
- g. Attend all mandatory Advocates meetings;
- h. Communicate any concerns regarding their Cases, Clients, or other relevant issues to an Executive Member;
- i. Communicate their actions with respect to the Service to the Executive Director or an Assistant Director no less than once every two (2) months;
- j. Perform such duties as determined by an Executive Member;
- k. Serve on one of the following committees:
 - a. Policy Committee;
 - b. Education and Outreach Committee;
 - c. Finance Committee;
 - d. Social Media Committee; or
 - e. Any other committees that the Executive Team requires.

10.2 Returning Advocates may be required to assist in the training of incoming Advocates.

10.3 Advocates shall make first contact with their Client within 24 hours and keep in regular contact with the Client for the duration of their Case.

Dalhousie Student Advocacy Service
Operating Policies

Policy 11: Appointment of Executive, Assistant and Summer Directors

Effective: September 1, 2005 Amended: April 1, 2017

- 11.1 The Executive Director External shall be selected:
- a. According to the DSU Constitution;
 - b. By the current Executive Director External, one additional DSAS member, and the VP AE;
 - c. No later than April 1st and;
 - d. For a one (1) year term from May 1st to April 30th of the following year.
- 11.2 The Executive members shall be selected:
- a. By the incoming Executive Director External and VP Academic External with input from the outgoing Executive Director External;
 - b. No later than May 1st ; and
 - c. For a term to coincide with the fall and winter Academic Terms, from September 1st to April 30th.
- 11.3 The Summer Director shall be selected:
- a. According to the DSU Constitution;
 - b. By the Executive Director External, one additional DSAS member, the VP AE;
 - c. No later than April 1st and;
 - d. For a four (4) month term from May 1st to August 31st.
- 11.4 The Assistant Summer Director shall be selected:
- a. Jointly between the Executive Director External, VP AE and Summer Director;
 - b. For a four (4) month term from May 1st to August 31st.
- 11.5 All applications submitted are to be kept strictly confidential, and shall be destroyed one (1) month after the recruitment process is complete unless circumstances require their confidential retention.

Dalhousie Student Advocacy Service
Operating Policies

Policy 12: Advocate Recruitment and Training

Effective: September 1, 2005

Amended: April 1, 2017

Recruitment

- 12.1 The Education and Outreach Coordinator, working with the Executive members, shall arrange for the advertising of Advocate recruitment in early September.
- 12.2 The Education and Outreach Coordinator, working with the Executive members, shall arrange DSAS presence at the Society Fair held at the Law School.
- 12.2 Positions shall be advertised for a minimum of two (2) weeks.
- 12.3 Openings shall be advertised using all available mechanisms of the Service and the DSU.

Application Process

- 12.4 Interested law students shall apply in writing by submitting a resume and cover letter.
- 12.5 Interviews shall be conducted by the Executive Team. Not all who apply will receive an interview.
- 12.6 The Executive Team will notify the successful applicants.
- 12.7 The application process shall be completed by October 1st of each year.

Renewal

- 12.8 Non-graduating Advocates may request renewal for the following year in writing no later than April 31st of their term. Such requests are not guaranteed approval.
- 12.9 Requests for renewal shall be submitted to the Executive Director External, which will be revised by the Executive Team, who shall have the discretion to renew the term of individual Advocates.

- 12.10 Factors to be considered for renewal include, but are not restricted to:
- a. Past performance;
 - b. Conduct with Clients; and/or
 - c. Positive contribution to the Service.

Training

- 12.11 Upon selection, each new Advocate shall be provided with access to an online Advocate Handbook as prepared by the Executive Team. A hard copy of this Handbook will be available in the office. Advocates shall familiarize themselves with the contents of the manual.
- 12.12 A combination of group training sessions and individual mentorship with returning Advocates shall be employed.
- 12.13 The training period for new Advocates shall normally be completed by November 1st or at the discretion of the Executive Director External.
- 12.14 The Executive Director Internal shall monitor the training progression of individual Advocates to ensure that all Advocates receive comparable education.
- 12.15 Returning Advocates shall serve as mentors for incoming Advocates. In this role, mentors shall supplement the group training sessions by providing more specific information (including the fielding of questions) for mentees.
- 12.16 Training topics shall include (but not be limited to):
- a. The Service's mandate and jurisdiction;
 - b. Principles of anti-oppression;
 - c. Cultural Competency;
 - d. Survivor-support and survivor-centered practices;
 - e. Active Listening;
 - f. Confidentiality;
 - g. Self-care;
 - h. Advocacy skills;
 - i. Office procedures;
 - j. Natural justice and administrative law;
 - k. An overview of important stakeholders;
 - l. The Advocate Code of Ethics;
 - m. Client relations and Case management;
 - n. Discipline and academic appeal processes;
 - o. Student Code of Conduct, harassment and discrimination processes;
 - p. Formal and informal resolution options;
 - q. Relevant committee terms of reference; and
 - r. Sample submissions and decisions;
- 12.17 All training sessions shall be mandatory for new and returning Advocates.

Dalhousie Student Advocacy Service
Operating Policies

Policy 13: Office Hours and Staffing

Effective: September 1, 2005

Amended: April 1, 2017

- 13.1 The Executive Directors shall staff the Office for no less than two (2) hours per week (unless enrolled in a clinic program).
- 13.2 Coordinators shall staff the Office for no less than two (2) hours per week (unless enrolled in a clinic program).
- 13.3 Advocates who are assigned Office hours shall staff the Office for no less than two (2) hours per week. Office hours are mandatory.
- 13.4 Office hours shall be scheduled from 9:00 a.m. to 4:30 p.m., Monday to Friday subject to University closures and holidays. Office hours will be reduced during Reading Weeks and exam periods as determined by the Executive Team.
- 13.5 During their Office hours, Members shall:
 - a. Respond to questions from Student drop-ins;
 - b. Conduct referrals;
 - c. Conduct new Client intakes;
 - d. Work on their own active Cases;
 - e. Review policies; and
 - f. Work on other duties as assigned by the Executive Team.
- 13.6 At the completion of each Office hour, Members shall note in the designated Service logbook events that occurred such as:
 - a. Telephone messages;
 - b. Intakes;
 - c. Consultations;
 - d. Mail received; and
 - e. Any other important information.
- 13.7 If an Advocate cannot fulfill their scheduled Office hours it is the duty of the Advocate to notify the Executive Director Internal and find a replacement.

Dalhousie Student Advocacy Service
Operating Policies

Policy 14: Salaries and Honoraria

Effective: September 1, 2005

Amended: April 1, 2017

Executive Directors

14.1 The Executive Director External and the Executive Director Internal shall each be paid two thousand, five hundred and 50 dollars (\$2550) per term, paid in two instalments in January and May.

Coordinators

14.2 Coordinators shall each be paid eight hundred and 50 dollars (\$850) per term, paid in two instalments in January and May.

Summer Director

14.3 The Summer Director shall be paid two thousand dollars (2000) per month from April 15th until September 30th, paid in monthly instalments.

14.4 Salary shall be paid by the DSU.

14.5 Both the Executive Director External and the VP Academic External shall have the ability to change salary amounts conditional upon:

- a. The changes are within the approved budget amount; and,
- b. That the affected recipient is provided notice of the change before accepting her position.

[k2]

Dalhousie Student Advocacy Service
Operating Policies

Policy 15: Complaints and Discipline

Effective: September 1, 2005

Amended: April 1, 2017

Complaints Concerning Advocates, Coordinators and the Executive Director Internal

- 15.1 Complaints concerning Advocates and Coordinators shall be made in writing to the Executive Director External.
- 15.2 When a complaint is received concerning advocates or coordinators, the Executive Director External and VP Academic External shall investigate the complaint and draft a brief synopsis of their investigation.
- 15.3 Should they deem that disciplinary measures are warranted, they shall have the discretion to dispense discipline in the form of:
 - a. An oral warning;
 - b. A written warning which shall include a meeting with the Executive Director;
 - c. A reduced Case-load or removal from the Case;
 - d. A letter of apology to applicable individuals; and,
 - e. Removal from the Service.

Complaints Concerning the Executive Director External

- 15.4 Complaints concerning the Executive Director External shall be made in writing to the VP Academic External.
- 15.5 The VP Academic External shall conduct an investigation as per the policies of the DSU.

Dalhousie Student Advocacy Service
Operating Policies

Policy 16: Case Assignment and File Management

Effective: September 1, 2005 Amended: April 1, 2017

- 16.1 Intake and client questionnaire forms shall be filled out during the first meeting with a Student.
- 16.2 Completed intake forms shall be put in the Intake folder and an email shall be sent to the Executive Director Internal to indicate the new intake.
- 16.3 The Executive Director Internal shall assign the Case to an Advocate based on:
 - a. The issues of the Case;
 - b. The experience of the Advocate;
 - c. No conflicts with other cases;
 - d. The Advocate's case preferences;
 - e. The Advocate's educational background; and,
 - f. The Advocate's current Case-load;
 - g. The Advocate's class schedule.
- 16.4 The Executive Director Internal shall endeavor to assign Cases equally amongst Advocates in consultation with the Executive Director External.
- 16.5 All files shall be dated and labeled in the format of year-month-last name (i.e.: 2005-09-SMITH).
- 16.6 All files shall be locked in the Office and only be removed as needed. Advocates shall ensure that files remain confidential at all times.
- 16.7 When closing a file, Advocates shall inform the Executive Director Internal of the case result and closure.
- 16.8 The Executive Director Internal shall:
 - a. Enter the relevant Case information into the Service's database;
 - b. File Case files appropriately.
- 16.9 The Executive Director Internal shall inform the Executive Director External of all Case closures and resolutions.

Dalhousie Student Advocacy Service
Operating Policies

Policy 17: Training and Transition of the Executive Director External

Effective: September 1, 2005 Amended: April 1, 2017

- 17.1 Following the appointment of the incoming Executive Director External, the outgoing Executive Director External shall schedule a series of meetings between the two to discuss:
- a. The Service and its operations;
 - b. Administration of the Service;
 - c. Duties of the Executive Director External;
 - d. Executive recruitment and selection;
 - e. Advocate recruitment and development;
 - f. Finances;
 - g. Accomplishments and areas of needed improvement; and,
 - h. All other relevant and important topics.
- 17.2 The incoming Executive Director External shall shadow the outgoing Executive Director External for the month of April following their selection.
- 17.3 The training and transitioning of the incoming Executive Director External shall be completed by May 1st following their selection.
- 17.4 Following the conclusion of their term, the outgoing Executive Director External shall make themselves available for consultation by the incoming Executive Director External as needed.

Dalhousie Student Advocacy Service
Operating Policies

Policy 18: Finances

Effective: September 1, 2005

Amended: April 1, 2017

- 18.1 The Executive Director External will be responsible for submitting a recommended budget to the DSU VP (Finance and Operations) at the end of their term for the upcoming year. This budget must be submitted no later than March 15th.
- 18.2 The incoming Executive Director External (or designate) shall meet with the DSU VP (Finance and Operations) before May 1st for a financial orientation session.
- 18.3 The Executive Director External shall select the members of the Finance Committee. Members of the Finance Committee will consist of:
- a. The Executive Director External (Chair);
 - b. One Executive member; and
 - c. Two advocates.
- 18.4 The Finance Committee shall keep an accurate record of the Service's financial situation, updated on a monthly basis.
- 18.5 All expenditures of the Service shall be subject to final approval from the Executive Director External with proper financial documentation.
- 18.6 The Executive Director External must include all financial information in their final report.