

# SAVE THIS

## Portable tools

Eighteen practical reference tools for finding sources, reading rules, preparing questions, and working with institutions.

Reusable student and educator materials for The Block

The Why Files · Case Notes · The Receipts · Save This · Make It · What Changed? · Behind the Case

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## Use the tool that fits the question

These tools are references to return to during a case, a project, or a real institutional question. Start with one decision. A short, specific record is often more useful than a page of general advice.

Some later cards introduce college terms. In The Block, use them to compare the roles you already meet at school with roles you may meet later. Titles and authority vary by institution.

# 01 Who Decides?

Use it when: everyone keeps naming different people.

1. Write the exact decision, not the whole problem.
2. Find the document that creates or describes the process.
3. Name who proposes, reviews, decides, implements, and hears appeals.
4. Check whether the decision is local, institutional, state, federal, contractual, or organizational.
5. Ask: who can change this particular thing?

Example: “Who decides whether our club gets \$600?” is easier to map than “Who controls student life?”

## Try it with this case

The clip cuts off right there

A cropped announcement says a tournament is “moving.” What original details would you need before telling a family to change travel plans?

## Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 02 Rule, policy, law, procedure, or preference?

Use it when: someone says “that’s the rule.”

LAW: passed by a government with lawmaking authority.

REGULATION: rule issued under legal authority by an agency.

POLICY: rule an institution or organization adopts for itself.

PROCEDURE: the steps used to carry out a rule/policy.

CONTRACT/BYLAWS: obligations accepted through agreement or organization governance.

PREFERENCE/NORM: something people want or usually do; not automatically enforceable.

Ask next: Who issued it? Where does it apply? Who enforces it? Who can change it?

### Try it with this case

Who made the dress-code rule?

If a club adviser sets a phone rule, which documents would help distinguish district requirements, school procedures, and club expectations?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 03 Find the Original

Use it when: Use before reposting a screenshot, quote, number, or clip.

1. Search the exact wording or title.
2. Open the issuer's page, full recording, report, policy, or post.
3. Check date, location/jurisdiction, and version.
4. Read what comes immediately before and after the quoted part.
5. Save the original link/file, not only the screenshot.

If you cannot find the original, say that. "I can't confirm this yet" is a valid result.

### Try it with this case

The clip cuts off right there

A cropped announcement says a tournament is "moving." What original details would you need before telling a family to change travel plans?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 04 Before You Repost

Use it when: the post makes you want to react fast.

What exactly is the claim?

Who posted it first?

Can you open the original?

Is the date/location still relevant?

What part is fact, inference, opinion, or joke?

What would change if this is wrong?

Can you share the source instead of the screenshot?

A question mark does not cancel the effect of spreading an unverified image.

### Try it with this case

The screenshot left the chat

How should a club handle a message that must reach an adviser for help when its group rule otherwise limits forwarding?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 05 Before You Sign

Use it when: Use for forms, leases, offers, releases, memberships, and agreements.

What am I agreeing to?

What do I have to pay or do?

What can the other party do?

When does it start/end/renew?

How do I cancel, appeal, withdraw, or change it?

What happens if I do nothing?

What linked policy or attachment is incorporated?

What should I save before I click/sign?

If the stakes are legal or financial and the language is unclear, pause and use a qualified resource before agreeing.

### Try it with this case

The free trial was not free forever

How would you evaluate a storage app offering one free month if the cancellation screen says access continues until the paid period ends?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 06 Read a Paycheck

Use it when: the deposit is not the number you expected.

1. Pay period: which dates are covered?
2. Hours/rate: what work is included?
3. Gross pay: earnings before deductions.
4. Taxes/withholding: amounts sent to tax authorities.
5. Benefits/other deductions: insurance, retirement, etc., if applicable.
6. Net pay: what remains after deductions.
7. Compare with your time/shift record before asking payroll a specific question.

Question structure: “My time record shows \_\_ hours for \_\_ dates. This statement shows \_\_. Can you help me understand the difference?”

### Try it with this case

Why did the total change at checkout?

How would your checklist change for a ticket advertised at one price but sold with a service fee and optional add-ons?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 07 Read a University Policy

Use it when: someone says “university policy.”

Find the policy title and policy number if available.

Check the issuing office and effective/revision date.

Find who the policy covers.

Separate definitions from procedures.

Find deadlines, notice requirements, review/appeal language, and exceptions.

Check linked procedures or handbooks; they may contain the actual steps.

Save the version you relied on.

Do not assume a professor rule, department practice, handbook sentence, and university-wide policy are the same level of rule.

### Try it with this case

Is “late” the same as “missing”?

An upload receipt exists, but a club application still says incomplete. Which records would distinguish a missing file from an unmet application requirement?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 08 Public Meeting Guide

Use it when: Use before a school board, council, committee, or other public meeting.

Open the agenda. Find the exact item.

Check whether the body decides, recommends, or only hears information.

Read sign-up/time-limit rules.

Know whether your name/comment becomes public.

Write one request the body can act on.

Bring one or two sources; do not spend your whole time retelling background.

Save minutes/recording afterward to see what happened.

A public comment can influence a process, but it is not itself the decision.

### Try it with this case

What happens at public comment?

How would you revise the same request if your audience were the parks commissioner instead of the advisory board?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 09 Ask an Office a Question

Use it when: Use before emailing or calling an institution.

1. What happened? One sentence.
2. What document/record are you looking at?
3. What exact question do you need answered?
4. Is there a deadline?
5. Why is this office the likely owner of the question?
6. What minimum personal information is actually needed?
7. What will you save after the conversation?

Best opener: “I’m trying to understand \_\_. I’m looking at \_\_ dated \_\_. Can you tell me \_\_?”

### Try it with this case

Why did the absence become a problem?

How would this method help when a permission form was sent but a team's participation list still says it is missing?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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# 10 Document an Issue

Use it when: the timeline matters.

Write the date/time and what happened.

Save the original notice, email, policy, receipt, or screenshot.

Record who you contacted and what they said.

Keep your own factual notes separate from your interpretation.

Save deadlines and confirmation numbers.

Do not secretly record where law/policy prohibits it; written notes are often enough.

Store sensitive records somewhere private.

A clean timeline is more useful than 40 unsorted screenshots.

## Try it with this case

The screenshot left the chat

How should a club handle a message that must reach an adviser for help when its group rule otherwise limits forwarding?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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# 11 Read a Source

Use it when: Use with any policy, article, post, chart, study, or notice.

WHO made it?

WHAT type of source is it?

WHEN was it made/updated?

WHERE does it apply?

WHY was it created?

WHAT can it establish?

WHAT can it not establish?

WHAT independent source would strengthen or challenge it?

Institutional does not mean complete. Personal does not mean useless. Ask what job the source can do.

## Try it with this case

It looks real. What can the picture prove?

A real photograph from last year is used to describe today's canceled game. How can you correct the caption without claiming the photograph is fake?

## Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 12 What Counts as Evidence?

Use it when: people are talking past each other.

Direct record: notice, contract, agenda, minutes, receipt, policy, dataset.

Observation/experience: evidence of what that person experienced, not automatically everyone's experience.

Expert analysis: useful within the expert's field and stated scope.

Research: strongest when methods/population fit the question.

Media/post: evidence of what was published/said; accuracy requires separate checking.

Rumor/hearsay: a lead to investigate, not proof of the underlying claim.

The question is not "Is this evidence, yes/no?" It is "Evidence of what?"

### Try it with this case

Why are they cutting the trees?

If a school removes mature trees and promises new landscaping, what evidence would help compare immediate losses with expected benefits across several years?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 13 Who Can Actually Change This?

Use it when: you know what is wrong but not the route.

Name the exact rule, process, amount, schedule, or decision.

Find who currently owns it.

Find the change mechanism: edit, vote, approval, appeal, contract amendment, administrative decision, election, or lawmaking.

Find the timing: ongoing, annual, meeting date, deadline, renewal.

Find what evidence the decision-maker normally uses.

Choose a next step; “wait and gather more” can be a real choice.

Power follows the decision, not the title. A president cannot personally change every campus rule.

### Try it with this case

What would you change at school, and what can actually change it?

How could you apply this method to a request for a new after-school activity when student interest, supervision, space, and funding are still uncertain?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 14 Email Before the Email

Use it when: Use before drafting the actual message.

WHAT HAPPENED: one factual sentence.

WHAT I KNOW: source/document + date.

WHAT I NEED: one answer, correction, record, meeting, or review.

WHO CAN DO IT: office/person with authority.

DEADLINE: if there is one.

ATTACHMENTS: only what is necessary; redact unrelated sensitive information.

Then write: greeting > context > specific ask > deadline if relevant > thanks/name. The thinking happens before the polish.

### Try it with this case

Did one complaint ban the book?

How would the same stage-by-stage method help evaluate a rumor that a petition has already changed a school rule?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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# 15 Meeting Prep

Use it when: Use for office hours, advising, conduct/appeal meetings, funding meetings, or supervisor check-ins.

Write your one-sentence goal.

Bring the relevant document(s).

List three questions in priority order.

Circle any deadline or number you need confirmed.

Decide what you will not disclose unless it becomes necessary.

Take notes; repeat back decisions and next steps.

Send a short follow-up confirming what you understood.

Leave with names, dates, next steps, and who owns each next step.

## Try it with this case

What does the school board actually do?

If a superintendent emails a new lunch schedule, what records would distinguish the person announcing it from the person authorized to approve it?

### Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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## 16 Appeal Prep

Use it when: a process allows review or appeal.

Find the actual appeal rule and deadline.

Identify who may appeal and what grounds are allowed.

Separate “I dislike the result” from an allowed basis for review.

Build a timeline with records.

Match each claim to a document or fact.

State the remedy you are requesting.

Follow format/submission rules exactly.

An appeal is a defined process. Do not assume it is a complete do-over unless the rule says so.

### Try it with this case

Who made the dress-code rule?

If a club adviser sets a phone rule, which documents would help distinguish district requirements, school procedures, and club expectations?

### Your working note

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# 17 Campus Office Translator

Use it when: you are being bounced between offices.

REGISTRAR: enrollment, course registration, academic records, transcripts (varies).

BURSAR/STUDENT ACCOUNTS: charges, payments, account balances, refunds (titles vary).

FINANCIAL AID: grants, scholarships, loans, work-study eligibility and aid rules.

DEAN: academic or student leadership role; authority varies by school/unit.

PROVOST: senior academic leader; exact portfolio varies.

STUDENT AFFAIRS: broad student-life/support division; local structure varies.

DISABILITY/ACCESS OFFICE: disability-related accommodations/access processes.

CONDUCT OFFICE: student conduct process; name varies.

When in doubt, ask: “Which office owns this decision, and what is the name of the process I should look up?”

## Try it with this case

Can everyone see my school records?

A permission form allows sharing a club attendance list through December. What extra authorization would you need before sharing members' contact details in January?

## Your working note

Apply the steps to one question from the case. Name the source or office that would make your next step more precise.

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# 18 College Title Glossary

Use it when: everyone seems to know the hierarchy except you.

PRESIDENT/CHANCELLOR: chief executive title varies by system.

PROVOST: usually senior academic officer.

DEAN: leads a school/college or student-area portfolio.

CHAIR: leads an academic department.

REGISTRAR: academic record/registration administration.

TRUSTEE/REGENT: member of governing board.

FACULTY SENATE: faculty governance body; authority varies.

ADVISER: may be academic, organization, faculty, staff, or professional adviser - do not assume the same powers.

Titles are clues, not proof. Check your institution's org chart, bylaws, policy, or role description.

## Try it with this case

What does the school board actually do?

If a superintendent emails a new lunch schedule, what records would distinguish the person announcing it from the person authorized to approve it?

## Your working note

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