

UNIVERSITY OF ALBERTA STUDENTS' UNION

# 2012 - 2013 Annual Report

## *Dear Students,*

We have achieved amazing successes including winning a province-wide freeze on tuition, breaking ground on the Physical Activity and Wellness (PAW) Centre, pushing back the withdrawal deadline, completing our SUB renovation proposal, and implementing the first undergraduate Spring/Summer U-Pass, only to name a few. We have also worked hard to overcome a plethora of challenges including the provincial budget cuts, our conflict with the University over Lister, and have advocated for pro-active solutions following traumatic events such as the HUB Mall shootings.

The Students' Union is proud to continue providing tremendous value to the students that we represent. This past year we saved students over \$1 million by changing our health and dental plan insurer, disbursed close to \$1 million to students in need through the Access Fund, awarded over \$100,000 in scholarships and bursaries through our Students' Union Awards program, and gave out nearly \$100,000 in student group grants. Students continue to receive an excellent deal in exchange for their \$37.50/\$31.73 Students' Union membership and dedicated fees.

I would like to send out a huge thank you to my amazing executive team; Dustin Chelen (VP Academic), Andy Cheema (VP Operations & Finance), Saadiq Sumar (VP Student Life), and Petros Kusmu (VP External) who put in countless hours and effort to make all of this magic happen. I would like to send an even bigger thank you to our staff, the true backbone of the Students' Union, headed by their fearless leader, General Manager Marc Dumouchel (SU President 91'-92'). All of our staff involved in services, businesses, building operations & maintenance, programming

This past year has been a time of great change for the University of Alberta and our student population.

& venues, and governance & advocacy had a tremendous role supporting and fostering the amazing success of our organization.

More than anyone, I would like to thank you, the students, for showing up to our events, utilizing our services, giving back to the community through student groups and volunteerism, and supporting us in times of need. It is your passion and desire to serve your peers that gives us the inspiration to continue fighting for your needs. The need for a barrier-free, affordable and accessible education is more important than ever and I would like to thank groups such as CAPSE, the Lister Hall Students' Association, every health & wellness group, and our international student groups for supporting a number of our key initiatives this year. I would also like to send a special thank you to our partner associations at Campus St. Jean (AUFJSJ) and Augustana (ASA) for helping deliver impeccable service to our students at our satellite campuses.

I am more excited than ever to see our Students' Union flourishing under its new leadership. The current executive is taking an unprecedented role in developing student engagement and building relationships with our internal and external partners all-while focusing on our core competencies; Building, Businesses, Services, and Advocacy.

It is with great enthusiasm that I present to you the University of Alberta Students' Union's 2012-2013 Annual Report.

Sincerely,



Colten Yamagishi  
SU PRESIDENT 2012-2013





*This annual report—part of the Students' Union's framework for remaining accountable to students—is intended to provide students with an overview of the activities of their Students' Union over the 2012–2013 academic year.*

## SUB RENOVATIONS

Primary planning and approval for the SUB renovation was a major goal for the Students' Union in 2012-13.

**10,229**

*Visits to the Financial Aid Office*

Project planning and design at the University roughly follows four stages: Functional Program, Schematic Design, Design Development, and finally Contract Documents. In 2012-13, our goal was to complete the Schematic Design and Design Development stages of the process.

Throughout the summer and fall of 2012, the Students' Union held over four dozen consultations with stakeholder groups – from the Bookstore and other tenants, to student groups, and the Dean of Students' office. These consultations were used in the creation of the Schematic Design report, which was presented to the University's Facilities Development Committee (FDC) in December 2012. Design Development followed shortly thereafter, being approved by Students' Council in March and by FDC in April. In May and June, the project went to the Board Finance and Property Committee and then to Board of Governors for final approval.

The design and governance processes took slightly longer than anticipated, delaying the initiation of construction by about two months. This, along with other considerations regarding minimizing conflict with PAW Centre construction and ensuring full financing approvals from government, resulted in the project schedule being modified: Exterior work on the plaza and atrium will be delayed until March 2014. To compensate, interior work has already begun and will continue through the winter, with most of the renovated space reopened by mid- to late-summer 2014. The atrium and plaza will be substantially completed in Fall 2014, with only the final landscaping remaining to be completed in Spring 2015.

**601**

*Visits to the Peer Support Centre*

The renovation project represents an effective collaboration between the Students' Union and the administration. Though there have been occasional disagreements, these have been resolved fairly easily and with good will, and the University's support of, and assistance with this project has been both invaluable and much appreciated.

Funding for the project is provided through a combination of a referendum-approved fee that will be assessed beginning 2014 (generating \$520,000 to \$590,000 per year) and a contribution of approximately \$360,000 per year from the Students' Union's ongoing operations.

The project has, with the exception of unexpected costs related to storm sewer relocations, remained on-budget. We expect that these unexpected costs will fit within the project's contingency funds, and that the overall project will remain within its budget envelope.

In addition to the more obvious changes and additions, the project will make a major contribution to the overall sustainability of the building. It's not a particularly showy element, but changes to the mechanical systems of the lower level of SUB are expected to cut energy use in the lower level by up to 60%. That's about \$24,000 in savings per year!

## ADVOCACY & REPRESENTATION

### Advocacy

The past year was very active for Advocacy. The advocacy efforts of the Students' Union remained committed to protecting and encouraging the student voice in decision making, promoting high quality education at the University of Alberta and promoting accessibility and affordability to education throughout Alberta.

#### Encouraging and Protecting the Student Voice:

- Stood up for Residence Associations when the U of A Residence Life announced major changes to residences late in the summer without consulting students
- Worked with student representatives who felt their voices were not being heard on governance committees to encourage better student representation
- Developed an agreement with the University of Alberta to create a student consultation framework through a mediated process

#### Fostering a High Quality Student Experience

- Continued to consult with students, administrators and staff on the logistics of a Fall Reading Week to promote student success
- Developed a plan through University Governance to promote graduate attributes and competencies to improve education outcomes for students
- Successfully advocated for changes to the elections act to make it easier for students to vote while studying
- Successfully re-negotiated U-Pass with substantial savings from the City's initial position
- Worked with partners to host the Ignite Conference on the future of higher education in Alberta

#### Promoting Accessibility and Affordability

- Successfully advocated for the elimination of parental contributions within student loan calculations
- Continued to promote the regulation of Mandatory Non-Instructional Fees to improve student control over the fees that they are charged
- Advocated to the Province for the creation of a Rural and Aboriginal bursary

## Representation & Governance

The Students' Union takes governance issues—transparency, fairness, and responsiveness—very seriously. We believe that good governance is essential to our success.

Discover Governance continued its mission of advising student and representative organizations, providing professional development and advice to representatives, and seeking to find ways to make governance more effective and broad-based.

A major disappointment was the lack of contested elections in several executive election races and the continued dearth of female candidates. The SU's staff makeup remained gender-balanced, but at both the Students' Council and Executive levels, gender representation continued to be unbalanced.

## SERVICES

The Students' Union offers members a wide range of services that exist to support students' academic, financial, and personal needs. Our services unit also provides job and professional development opportunities to more than 50 staff and 800 volunteers.

### Highlights

Center for Student Development: Student retention for day 2 of orientation was up significantly; partnership with the Alumni Association led to excellent events for continuing students, highlighted by a standing-room-only event by Dan Riskin of Daily Planet; and the co-curricular record was finally formally launched.

InfoLink: Renovated the SUB info desk and finalized partnership agreements regarding new info kiosks in HUB mall and Student Connect. The Engineering info desk was closed and the space turned over to the Engineering Students' Society.

Peer Support Centre: Increased volunteer and client numbers, and modified the volunteer training program.

Student Group Services: Revised granting processes, improved event planning resources, and increased staffing levels to meet growing needs.

Safewalk: Began a summer walk program and increased collaboration with Campus Protective Services.

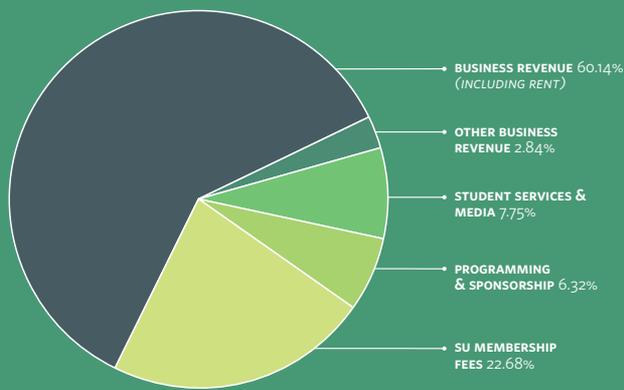
Student Financial Aid Information Centre: Expanded financial literacy programming and worked with the Student Financial Aid Task Force to plan improvements to the U of A's student financial support system.

Sustain SU: Farmer's Markets added to regular program, coordinated a Student Sustainability Summit, and formalized collaboration with the University on a Naturalization Site.

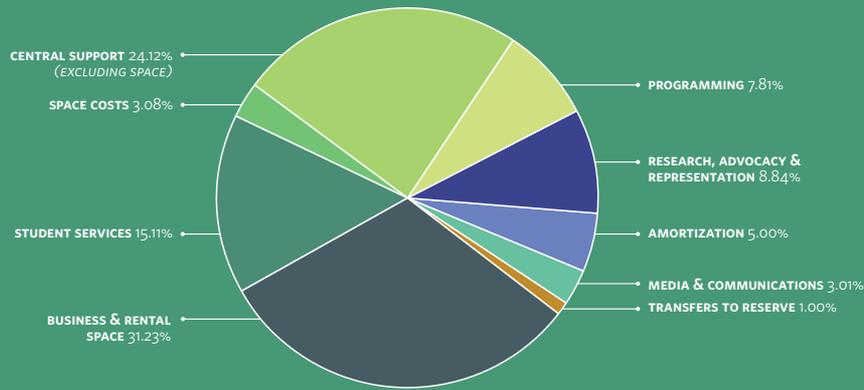
**108,059**

*Visits to InfoLink*

**STUDENTS' UNION REVENUES**  
(Excludes Dedicated Fees and the Health & Dental Plan)



**STUDENTS' UNION EXPENDITURES**  
(Excludes Dedicated Fees and the Health & Dental Plan)



Gender-Based Violence Prevention Program: Completed a gender-based analysis, a community plan and collaborated with several other groups on a variety of projects, including Feminist Self Defense and educational speakers such as Jacklyn Friedman.

**PROGRAMMING & VENUES**

The SU operates venues including Myer Horowitz Theatre, Dinwoodie Lounge, and SUBstage, as well as coordinating a variety of major campus events. These events are designed to welcome students to campus and engage students in life outside of the classroom. Programming varies from entertainment to friendly competition.

UASUevents produced annual campus wide events such as Week of Welcome, Campus Cup and AntiFreeze. In addition to these large-scale events, UASUevents hosted free monthly movie nights in

the Horowitz Theatre, a Singer/Songwriter series, and Comedy Nights

The Myer Horowitz continues to be a very busy venue catering to student and university groups as well as community groups. Some of the acts hosted by UAUSevents last year include Royal Wood, the CBC's Irrelevant Show and Frank Warren of Post Secret. Dinwoodie was used by a variety of groups for a range of activities including the Imagnus Poster Sale, the campus musical, toga parties, gala dinner and dance space. UASU presented Faber Drive with Victoria Duffield and Christian Hansen.

**BUSINESS, LEASE, & BUILDING OPERATIONS**

The Students' Union Building has traditionally served as the 'living room' of campus, a place

for students that is comfortable, accessible, and friendly. SUB acts as a hub for student services, for student groups, and for the social and study needs of students.

Our excellent facilities staff continued to provide a clean, safe environment for students 24 hours a day, 7 days a week. As always, when doing cleaning or maintenance, sustainability is a key consideration. We use environment-friendly cleaning products and are well-known on campus for our inventory of recycled and repurposed building

**165,000** Searches on the Housing Registry

materials. Much of the furniture that the SU uses is original building equipment from 1967 or from

**THE STUDENTS' UNION, THE UNIVERSITY OF ALBERTA  
CONSOLIDATED STATEMENT OF OPERATIONS  
YEAR ENDED APRIL 30, 2013 WITH COMPARATIVE FIGURES FOR 2012**

	2013					2012				
	CAPITAL ASSET FUND	EXTERNALLY RESTRICTED FUNDS	STUDENT INVOLVEMENT FUND	UNRESTRICTED AND INTERNALLY RESTRICTED FUNDS	TOTAL OPERATIONS	CAPITAL ASSET FUND	EXTERNALLY RESTRICTED FUNDS	STUDENT INVOLVEMENT FUND	UNRESTRICTED AND INTERNALLY RESTRICTED FUNDS	TOTAL OPERATIONS
<b>GENERAL REVENUE</b>										
Student Fees (includes Health and Dental Plan)	-	\$2,275,680	-	\$6,690,479	\$8,966,159	\$-	\$2,211,670	\$-	\$6,074,385	\$8,286,055
Interest and dividends	-	-	113,270	163,047	276,317	-	-	81,099	163,122	244,221
<i>SUBTOTAL: General Revenue</i>	-	2,275,680	113,270	6,853,525	9,242,475	-	2,211,670	81,099	6,237,507	8,530,276
<b>DEPARTMENTAL REVENUE</b>										
Business Activities	-	-	-	5,457,013	5,457,013	-	-	-	5,724,651	5,724,651
Programming and Event Activities	-	-	-	690,582	690,582	-	-	-	664,834	664,834
Student Service Activities	-	-	-	672,262	672,262	-	-	-	554,053	554,053
Central Support and Space Activities (including SUB)	-	-	-	519,690	519,690	-	-	-	536,139	536,139
Representation Activities	-	-	-	86,005	86,005	-	-	-	105,500	105,500
Reserve Activities	-	-	24,750	240,087	264,837	-	-	31,000	259,477	290,477
<i>SUBTOTAL: Departmental Revenue</i>	-	-	24,750	7,665,639	7,690,389	-	-	31,000	7,844,654	7,875,654
<b>TOTAL GENERAL AND DEPARTMENTAL REVENUE</b>	-	2,388,950	138,020	14,519,164	16,932,864	-	2,211,670	112,099	14,082,161	16,405,930
<b>DEPARTMENTAL EXPENSES</b>										
Business Activities	-	-	-	4,062,576	4,062,576	-	-	-	4,116,086	4,116,086
Programming and Event Activities	-	-	-	745,821	745,821	-	-	-	749,845	749,845
Student Service Activities	-	-	-	1,387,042	1,387,042	-	-	-	1,365,728	1,365,728
Central Support and Space Activities (including SUB)	-	-	-	2,307,053	2,307,053	-	-	-	2,252,405	2,252,405
Representation Activities	-	-	-	647,295	647,295	-	-	-	638,893	638,893
Reserve Activities	-	1,696,037	89,943	4,555,007	6,340,988	-	1,900,955	104,648	4,122,293	6,127,896
<i>SUBTOTAL: Departmental Expenses</i>	-	1,696,037	89,943	13,704,794	15,490,775	-	1,900,955	104,648	13,245,250	15,250,853
<b>GENERAL EXPENSES</b>										
General Amortization	506,247	-	-	-	506,247	-	-	-	-	-
Interest on Long-term debt	-	-	-	9,504	9,504	507,447	-	-	-	507,447
Amortization of premiums and discounts on investments	-	-	-	12,716	12,716	-	-	-	28,504	28,504
Realized loss (gain) on disposal of investments	-	-	(104,546)	(49,230)	(153,776)	-	-	3,336	8,214	11,550
<i>SUBTOTAL: General Expenses</i>	506,247	-	(104,546)	(27,009)	374,692	507,447	-	(37,022)	43,361	513,786
<b>TOTAL GENERAL AND DEPARTMENTAL EXPENSES</b>	506,247	1,696,037	(14,603)	13,677,785	15,865,466	507,447	1,900,955	67,626	13,288,611	15,764,639
<b>NET REVENUE (EXPENSES)</b>	\$(506,247)	\$692,913	\$152,623	\$841,379	\$1,067,398	\$(507,447)	\$310,715	\$44,473	\$793,550	\$641,291

the 1993 renovation—we just refurbish and re-fresh it when needed.

Students' Union-operated businesses generate revenue (helping to keep student fees lower) and provide over a hundred part-time job opportunities for students. They also help students affect the campus market: coursepacks - produced by the Students' Union and sold at the Bookstore - help keep the cost of course materials down and their currency and relevance up. In addition to its own businesses, the Students' Union leases space to a number of retail and food tenants.

Profits from business and lease operations go directly to offset the cost of our advocacy, student services, and building operations. Without this contribution, providing services at the level we do would require Students' Union fees to be approximately \$50 higher than they are currently.

#### Highlights

For 2011-12, the combined net revenue (profit) from business and lease operations decreased 13%, from \$1.609M to \$1.394M. Weaker performances from food and beverage units and SUBtitles/SUBmart offset stronger lease and SUBprint performance. The SUB food court struggled overall, dropping 4% overall across all vendors.

**540** Number of Volunteers at Orientation

The 2012-13 fiscal year was a major lease-cycle year. Every five years, most of the space leases in the building come open, including those in the food court, and significant effort is devoted to renewals and seeking new tenants.

Following an open RFP, food court tenancies were signed with four existing vendors and one new vendor, with one other vendor withdrawing from SUB. SUBway, Marco's, TacoTime, and Edo all renewed their leases and Opa! was added as a new food court tenant. Part of the RFP process included commitments from vendors to work with the Students' Union on future projects to significantly reduce the environmental impact of operations, particularly waste. Java Jive withdrew from SUB (and from HUB), and was replaced by a new SU-operated coffee vendor, The Daily Grind. These changes have thus far been positive, with September 2013 recording the highest one-month sales ever and up 15% over September 2012.

All existing ATM contracts were renewed, and TD was added as an ATM provider. All major Canadian banks except the Bank of Montreal now have a presence in SUB.

**1035** Number of walks made by Safewalk

Finally, a new five-year lease was negotiated with SUBphoto, which has proved very successful since launching in SUB a few years ago.

Work began on a Joint Gender Neutral Job Evaluation program for unionized staff, the goal being to work toward gender-neutral compensation rates.

Our food and beverage units underperformed in 2012-13, and have been revamped for this year with the replacement of Cram Dunk and Juicy with The Daily Grind. Catering sales continued to increase.

SUBtitles and SUBmart also underperformed, and steps were taken to reduce the cost structure of those operations. They were co-located on the main floor and we are expecting improved net revenue performance from the combined unit in the coming year. Some of the reduced performance is due to continuing shifts to on-line materials and publisher practices intended to minimize the resale market for textbooks.

SUBprint continued its strong record of net revenue generation, fueled by the decision two years ago to buy out one of the major equipment leases. Performance could have been even better, but was handicapped by delays in copyright approvals, which discouraged the use of coursepacks by professors.

Other operations generally performed in conformance with expectations.

#### MARKETING & COMMUNICATIONS

Marketing & Communications continued to provide marketing support and graphic design services to the whole organization (and further afield) through The Studio and its marketing efforts. One highlight among many was the complete identity design work for the IGNITE Conference. SUTV installations on campus, with several new partners, grew from 18 to 20, and are on pace to break 50 screens by the end of 2013. In addition, the first screens have now been installed at Campus St. Jean and Augustana.

#### FINANCES

We are audited annually by an external Auditor, whose work is contracted and supervised by the Audit Committee. Management does not sit on the Audit Committee. The auditor, KPMG, has approved the financial statements as a fair representation of the Students' Union's finances.

On the recommendation of the auditor, our finances were restated in accordance with new guidelines for non-profits. This only had minimal material impacts on our financial statements, primarily around how investments are valued and accounted for.

We have included here the two most important statements, the Statement of Financial Position (a balance sheet) and the Statement of Operations (a version of an income statement). These are very general overviews; the full Financial Statements contain much more detail on operational finances, and can be found on the SU website: [www.su.ualberta.ca/budget](http://www.su.ualberta.ca/budget).

For the non-accountants among our members, it is important to note that the Net Revenue listed

#### CONSOLIDATED STATEMENT OF FINANCIAL POSITION APRIL 30, 2013 WITH COMPARATIVE FIGURES FOR 2012

	2013	2012
<b>ASSETS (Current)</b>		
Cash	\$3,859,517	\$3,105,498
Accounts Receivable	574,648	500,556
Accrued Interest Receivable	410,941	100,005
Merchandise Inventories	339,816	348,796
Prepaid Expenses & Deposits	159,951	399,992
	<u>5,344,873</u>	<u>4,454,847</u>
<b>ASSETS (Held)</b>		
Investments	6,758,561	6,250,356
Capital assets	6,963,022	6,981,049
	<u>\$19,066,456</u>	<u>\$17,686,252</u>
<b>LIABILITIES (Current)</b>		
Accounts Payable & Accrued Liabilities	\$1,440,875	\$1,024,740
Deferred Revenue & Deposits	1,651,562	1,578,908
Current Portion of Long-Term Debt	-	299,058
	<u>3,092,437</u>	<u>2,902,706</u>
<b>LIABILITIES (Other)</b>		
Long-Term Debt	-	-
	<u>\$ 3,092,437</u>	<u>\$2,902,706</u>
<b>FUND BALANCES</b>		
Invested in capital assets	\$6,963,022	\$6,681,991
Externally restricted funds	1,572,344	992,701
Student Involvement Fund	3,303,846	3,102,522
Internally restricted funds	1,689,847	1,602,761
Unrestricted funds	2,444,960	2,333,321
	<u>15,974,019</u>	<u>14,713,296</u>
	<u>\$19,066,456</u>	<u>\$17,686,252</u>

on the Statement of Operations does not represent the annual surplus or cash flow available to general operations of the Students' Union. Due to the way amortization, building loans, restricted fund allocations, and capital purchases

**400** Number of groups registered by Student Group Services

are accounted for, the actual annual cash surplus or shortfall is best represented by change in the Unrestricted Reserve. This Reserve declined by \$33,000 in 2012-13, reflecting additional off-budget spending approved by Students' Council around the renovation project and legal advice in the LHSA matter.

#### IT'S YOUR STUDENTS' UNION!

Student engagement and effective representation are central to the Students' Union. The SU's future depends on you: Without students willing to step into leadership positions or without a student body willing to voice its concerns, the Students' Union cannot succeed.

Get involved in your University! You can join a club, volunteer for one of our student services, or run for elected office. There's much to learn, and great experiences to gain, by becoming an active member of your community. This University runs on your energy, your enthusiasm, and your ideas.



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