



ubcfa
2022

Annual Report



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Annual Report 2022

President's Report

Dory Nason, President

Dear Colleagues,
This is my first report as President and I am grateful to present this report to our membership whose work takes place on the unceded, traditional, and ancestral lands of the Musqueam and Sylix nations. It has been my honor to serve the membership and to be a part of many important accomplishments this year at the Faculty Association.

I'll start my report with an update on the motion that was presented to the Faculty Association last Spring and discussed at last year's June AGM and the follow up meeting in September. Although it took all parties longer than we had expected to form the Data Committee of eight members, I am happy to report that the Committee has held its first meeting and have asked for staff support in undertaking research over the summer with the goal of a final report and recommendations at the Fall General Meeting.

As you will hear from our Treasurer, Karen Smith, the Faculty Association continues to be in a financially healthy position with an unqualified audit report. Following the Treasurer's Report at last year's AGM wherein the Association identified just over a million dollars in savings owing to the restrictions imposed by the pandemic, a member asked whether the Faculty Association is considering a dues holiday to draw down the excess savings. I am happy to report that the issue has been raised and discussions will continue within the Executive Committee; we welcome member feedback on the subject.

Following an intense year at the bargaining table, we were pleased to announce that we have achieved a negotiated settlement with the University. The new Collective Agreement contains many important language changes, with enhanced

study leave and retirement options, more transparency around workloads, and new language that better recognizes Indigenous forms of scholarly activity. I wish to thank the Indigenous JCC for their work in accomplishing this last item as it was two years in the making. Building on this work, we also agreed in this round to strike two new joint committees with UBC related to further exploring non-traditional or diverse forms of scholarly activity, and one to look at non-western alternative dispute resolution processes. There were also reasonable salary increases in this round, protecting members from high inflationary numbers over the past couple of years. We are also very pleased that we were able to provide additional salary adjustments to our colleagues in the Educational Leadership Stream and Lecturers in recognition of their valuable work and contributions to advancing the academic mission. I'd like to thank Liz Hodgson, Chair of the Bargaining Preparation Committee, for all her work over this past year. Jim Johnson, who has been our Chief Negotiator for a number of years had his last round at the table – thank you Jim for your dedication over many years to serving the membership. While I won't list all the names of the preparation and bargaining committees, I am grateful for the many hours of work they put in to help us achieve this very positive outcome.

Now that bargaining is behind us, the Faculty Association and the University will resume our Joint Consultation Committee (JCC) meetings. These regular meetings, which are a requirement under Section 53 of the Labour Relations Code, provide an opportunity for the employer and the union to come together and discuss issues facing the membership and the academic community more broadly. I look forward to resuming these discussions and tackling the challenging issues our members are facing, including following up on

the work of the previous JCC related to promotion and tenure concerns as a result of the disruptions to academic work caused by the pandemic.

Although the pandemic has been declared over, COVID had a significant impact on our membership – particularly in terms of workloads – but, alongside some organizational changes, has created some significant shifts in the labour relations environment. You will hear from the Chair of the MSGC, Bronwen Sprout, that we have an unprecedented number of grievances this past year, with more on the horizon as we enter into the 2023-2024 academic year. As well as working through the more formal labour relations grievance and arbitration processes to resolve these matters, which falls under the purview of the MSGC and Executive Committee, our Executive Director and I have also been meeting with the Directors of Faculty Relations on both campuses with a view to improving the relationship between the parties, fostering meaningful dialogue within the grievance procedure, and re-focusing our efforts on solving problems and managing issues through our Collective Agreement. We are also exploring how we can better support and train Heads/Directors who are often dealing with issues that arise in their departments.

I would also like to highlight the important work of our newly formed Equity Committee. You'll see in Elisa Baniassad's report that the Committee, which has a significant number of volunteers, has been very active over the past year. I'd like to thank Dr. Baniassad for her leadership in this important area of our work. Sarika Bose, Chair of our Contract Faculty Committee has also been very active in promoting the issues affecting our colleagues on contracts at UBC and fostering a community of practice to highlight the important perspectives and expertise these colleagues contribute to the academic work at UBC.

Our Librarians and Archivist Committee, Chaired by Anne Olsen, has also been quite active in its work over the past year. From successes in im-

proving the merit and PSA process for members in the Library, the Committee has also been working on establishing a Librarian's Council to provide input and advice to the Library's leadership. This is an important collegial governance issue, and we look forward to continuing that dialogue with Susan Parker.

The Okanagan Faculty Committee has also contributed significantly to our work over the past year. While initially led by Diana Carter, the Committee discussed several important issues confronting our members on the Okanagan Campus, including the course scheduling system, which is wreaking havoc on teaching schedules, disrupting research and other professional opportunities, and potentially undermining the role of Heads in managing these aspects of faculty work, as articulated in the Collective Agreement. The Faculty Association continues to investigate the matter and will be following up on the concerns we have already raised with the University. I'd like to thank Diana for her work chairing the committee (before she took on the role of Associate Dean) and to Kevin Chong for stepping in to continue the work of the Committee and who will continue on as our first chair of the Anti-Racism and Indigenous Initiatives Committee.

I'd like to thank my Executive colleagues for their service, and to our staff who have shown me over and over this past year how dedicated they are to the work they do in service to our colleagues. It has been a year full of challenges and triumphs for me personally and I am eternally grateful to my colleagues for their commitment to the work. Finally, I want to thank the members for their insights with a special thanks to those who have attended our consultations, volunteered on committees and offered feedback throughout the year. I hold my hands up to you all.

Chi Miigwech,
Dory Nason
President

CFC Annual Report

Sarika Bose, Chair; Contract Faculty Committee



The 2022-2023 Experience for Contract Faculty

Shifting Administrative Policies

In 2022-2023 teaching mostly returned to pre-pandemic modes of delivery, with some hybrid versions possible. Not all was settled though. Changing administrative policies during the year regarding student accommodations, left both students and contract faculty confused and facing higher workloads. Accommodations allowed during COVID had become normalized for students, and even a partial return to previous academic policies was often a shock to them. Contract faculty experienced the increased burden of student dissatisfaction with unclear, unequal and fluctuating administrative policies with particular acuteness as it was often reflected on the anonymously gathered student opinion surveys, which impact their ongoing employment in more direct ways than their tenured and tenure-track colleagues. Contract faculty also do the bulk of teaching in some departments and took on the brunt of student concerns.

Student Experience of Instruction

As always, student opinion surveys (“student experience surveys”) continue to be deeply problematic and can have disproportionately negative effects on the assessments of teaching

faculty. Contract Faculty are uniquely vulnerable to student dissatisfaction as their concerns are that their continued employment often depends on high student ratings. For contract faculty in particular, the anonymous opinions on the work of professionals by non-professionals often result in mental health as well as labour equity and employment security problems.

Job Insecurity Continues

We continue to hear concerns as student numbers and attendant course offerings drop lower in certain programs, the anxiety level of contract faculty has risen, and both sessional and lecturer contracts are in jeopardy in some units. For example, a recent policy change by the Faculty of Science has directly affected the ongoing jobs for lecturers in Arts.

The Committee’s 2022-2023 Work

The patterns formed by the pandemic are not easy to overcome. Just as student presence on campus is lower, so is the in-person presence of faculty. However, over the course of the year, the Contract Faculty Committee has seen a steady increase in participation. More contract faculty submitted proposals for the May 2023

Colloquium, offered and attended workshops at the Contract Faculty Community of Practice and attended social events. The 2023 Colloquium was as successful as ever, with a truly interdisciplinary set of papers on field-specific disciplines, pedagogy, and student engagement. The Publication Display featuring recent scholarly books and articles, as well as non-fiction and fiction prose by Contract Faculty was impressive, and the goal is to begin building a bibliography of this work that can be expanded each year.

The Committee continued hosting a monthly Community of Practice for Contract Faculty at both campuses, co-facilitated and sponsored by CTLT, with which the Faculty Association has partnered for almost a decade. This year we offered workshops that focused mainly on feedback pedagogies, such as grading strategies and learning reflections, and potential AI impacts. Despite small numbers at events at times, feedback from participants has emphasized that such events allow for unique experiences in and opportunities for collegiality and inclusivity that are unavailable for Contract Faculty elsewhere at UBC.

Fair Employment Week remains a staple of the Committee's work and this year we organized a series of events including tabling at the Nest, a poster and postcard petition campaign and a members' lunch on both campuses.

In addition to our community engagement projects, the Committee worked on two informational documents. The first tracks the bargaining gains Contract Faculty have made over the last several decades. The second is a revision to the Contract Faculty Handbook, to include the changes to rights and benefits in recent years. Both are intended to be posted to the Faculty Association's website in the coming months.

One goal of the Committee this year was to increase participation and community

engagement between the two campuses at formal events. In conjunction with the Okanagan Faculty Committee, the CFC hosted two lunches and meeting days at the Okanagan campus, once in fall, during Fair Employment Week, and once in the winter term. These events were well-attended and increased virtual attendance at the Contract Faculty Community of Practice sessions. This report gratefully acknowledges that a new Collective Agreement was bargained by the Faculty Association Bargaining Committee just before this report was written, and that it provided some long-awaited gains for Contract Faculty at UBC. We appreciate the commitment and hard work by the Committee.

Chair's Work

In August 2022, I gave a paper on the issues faced by Contract Faculty after the pandemic at COCAL Mexico. COCAL (Coalition of Contract Academic Labour) includes Canada, the U.S. and Mexico. I also accepted the invitation to be on the International Advisory Board of COCAL and am now serving on the editorial board of COCAL Updates, the Association's online newsletter, where I am increasing the scope of reporting to international Contract Faculty issues.

Conclusions

This has been an active year for the Contract Faculty Committee, and I would like to thank Deena Rubuliak, Executive Director, and Robin Roff, Associate Executive Director, for all their work during the year, Sean Hillman, MSO, Emma Burry, Communications Coordinator, and Jan Gunn, Executive Assistant, for their assistance. A special thanks to the Faculty Association staff, who took the time to support the committee during Fair Employment Week. Our work as a Committee would not be possible without their assistance.

Respectfully submitted,
Sarika Bose
Chair

EC Annual Report

Elisa Baniassad, Chair; Equity Committee

This was the inaugural year for the Faculty Association Equity Committee (EC), which was created through changes to our Constitution and Bylaws as approved by the membership. The Committee's mandate is to, among other things, identify structural sources of discrimination, bias, inequity and exclusions, and ableism within policies, procedures or practices at UBC and to work to reduce and eliminate such barriers.

COMMITTEE STRUCTURE & FORMATION

The structure of the committee this year used a federated model, wherein there was one working subgroup dedicated to each of the major equity deserving groups at UBC: LGBTQ2SIA+, BIPOC, Disabled faculty, and Women (formerly the Status of Women committee).

Meetings were scheduled in a rotation: first the broad Equity Committee met, then each of the subgroups, then the broad Equity Committee again. The goal of the broader meeting was to bring together intersectional concerns and identify common interests of the subgroups.

Each of the groups had their own actions and activities that arose out of the individual discussions.

WORKING GROUP ACTIONS

Disability and Accommodation Section for FA Website

We identified that there are many pieces of helpful information that could be provided to members through the FA website. We are now working on a new section that will provide information to members on accommodations. Another article will be on what to do if you have been incorrectly paid by Workday, which happens often to colleagues as they transition to and from leaves.

Review of the Positive Space Campaign

There was concern that UBC's Positive Space campaign was structurally problematic, and stigmatizing for people from certain groups. Upon review we were encouraged to see that it has been completely restructured. We will continue



to monitor to see if the problematic dynamic is still present.

Hosted a Campus 2050 Event for Faculty

Because the physical space of the campus is in many ways an equity issue, we took the opportunity to deeply engage with the Campus 2050 process, advocating for the needs of, in particular, disabled faculty and child-raising faculty. We felt encouraged by the group's responses, and will continue to maintain contact with the process to see how it evolves.

Developing an Equity Survey

An overarching goal of the Committee is to understand the experience of members from equity denied groups in comparison with other members. We jointly developed the foundation for a survey that will explore our members' experiences with equity and inclusion at UBC.

THANKS TO ALL

It has been my extraordinary pleasure and privilege to chair this Committee - through COVID and beyond. I have so very much appreciated all the work that the members of the Committee have done, and all the support they provided. The Committee truly became a community unto itself, and I am just so happy to have been a part of it. Thank you to everyone.

And a special thanks to Shayna Frawley, UBCFA MSO, who took diligent notes at our meetings and to Robin Roff, who is the engine behind all the amazing work this group has done. We quite literally could not have achieved anything without you. I am infinitely impressed by your energy and insight. Thank you!!

Respectfully submitted,
Elisa Baniassad
Chair



LAC Annual Report

Anne Olsen, Chair; Librarians & Archivists Committee

The Librarians and Archivists Committee (LAC) mandate is to keep informed of the affairs of the Library and bring matters that directly concern librarians and archivists to the attention of the Association, and to act as a forum for ideas brought forward by our members.

I completed the first year of my second term as Chair of the committee in 2022-2023. During this year we continued our work to review and make improvements to the Library's merit and PSA procedures on both campuses. In recognition of the significant contributions librarians and archivists made under challenging circumstances during the COVID-19 pandemic, and their continued support to the academic mission of the University and the UBC community, the Faculty Association and the University signed a Memorandum of Agreement for equal distribution of the 2022 PSA monies to all eligible librarians and archivists. These monies were in addition to the regular merit awards for the same period.

Through further agreements with Library administration in 2023, we brought the Library's merit and PSA review more in line with other processes around the University and increased the protection of member's privacy by ensuring that the commentary of Heads is shared only with the University Librarian and not the overall review Committee.

Bargaining was a significant focus for our work in 2022 and the beginning of 2023. Following various consultation opportunities, we took forward a number of proposals specific to the Library. Of course, librarians also benefit from many of the proposals that are part of

bargaining more broadly. I was a member of the Faculty Association bargaining team in this reporting period.

With the completion of bargaining in the spring of this year, I look forward to working with the Faculty Association and members of the Librarians and Archivists Committee to re-engage with the University and Library administration through our Library Joint Consultation Committee. There are a number of issues to prioritize, including: further improvements to our merit and PSA processes; clarity on both campuses about the Library reporting structure and governance for UBCO; better processes, transparency, and understanding of internal and interim appointments and opportunities within the Library; and the establishment of a Librarians and Archivists Council to participate in collegial governance at the UBC Library.

As always, I would like to extend my sincere thanks and gratitude to the Librarians and Archivists Committee members who dedicate their time and expertise to this important work. We will send out a formal call for new members on the committee soon, however, we welcome new members at any time! I am also grateful for the ongoing support and knowledge Deena Rubuliak so generously shares with us, and the excellent work of the Faculty Association staff on behalf of our committee and our members.

Respectfully submitted,
Anne Olsen
Chair

MSGC Annual Report

Bronwen Sprout, Chair; Members Services & Grievances Committee

The Member Services and Grievance Committee (“MSGC”) is responsible for overseeing the processing and resolution of questions about the Collective Agreement and University policies and processes, complaints and grievances, and recommending for or against proceeding to arbitration on grievance files. The MSGC is composed of members from across both campuses in various ranks and disciplines. We seek to have wide representation on this committee so that we can maintain a collegial dialogue on how best to resolve issues that are brought to our attention. Thanks in large part to work undertaken under the previous committee chairs and the Executive Committee, the MSGC represents a diversity of individuals from across the membership.

The MSGC meets monthly with the professional labour relations staff of the Association (called Membership Service Officers or MSOs, though the Executive Director and Associate Executive Director also manage labour relations files) to review and discuss issues confronting the membership. Where the MSGC and the professional staff identify trends on issues or patterns of complaints regarding a workplace policy or process, the Committee may also recommend policy grievances to the Executive Committee.

The Association opened 395 case files between Jan 1 and Dec 31, 2022. Of these, 332 were resolved by year end, 245 of which were concluded without needing a formal or informal grievance. The overall workload of the Association has increased from 354 cases last year. For a breakdown of the changes by case type see the chart later in this report.

When the informal process is unsuccessful or the FA and UBC reach an impasse, the FA files a formal, written grievance. If the Association is unable to settle a formal grievance, the MSGC deliberates and makes a recommendation to the Executive Committee as to whether the Association should advance the file to arbitration. Such recommendations are based on extensive discussion and consideration between MSGC members and professional staff. The Executive Committee, after receiving the recommendation and considering the matter themselves, makes the final decision on which files proceed to arbitration. Even after we formally file for arbitration, the Faculty Association continues to work towards a resolution with the University outside the arbitrator’s room, as this generally results in better gains for our members.

The Faculty Association filed 8 grievances this year on matters ranging from unpaid wages, the denial of study leave, discipline and the denial of promotion. Of particular note, were two cases involving the University’s failure to complete investigations in a timely manner. This has been an ongoing concern for the FA as investigation procedures drag on for upwards of a year and sometimes more. The average length of the 14 investigations completed in 2022 was 153 days. As of this writing there were 20 open investigations from this year and past years, of which the average length is 272 days, and 7 have taken longer than a year to this point. In many cases this length of time is entirely unnecessary. UBC has advised us that they have no powers to direct investigators, or the various University Offices tasked with performing investigations, to work within a specific timeline or to resolve delays. The Association believes this is an abdication of the

Employer's fundamental responsibility to treat our members fairly and respectfully, and further evidence that the investigations process at UBC needs significant improvement. The Association continues to advocate for changes at the bargaining table, in grievances and through political action.

In May 2022 the FA received a disappointing ruling in the Lecturers' Excellence Test arbitration. In the ruling, Arbitrator Pেকেles determined that the University is permitted to apply a test of teaching excellence each time a lecturer's contract is up for renewal, whether they have worked at UBC for 1 year or 20. The Association believes this constant uncertainty is unjustified, and a key goal in this round of bargaining is to obtain greater job security for Lecturers. We have proposed that individuals who have taught more than six years at UBC earn appointments without term. Though these positions could still be terminated if work ceased to be available, our colleagues would no longer have to prove their excellence repeatedly simply to maintain their employment.

Faculty members bring a wide range of matters to the Faculty Association each year. In some instances, these are questions or concerns that require only advice or support, in others, direct intervention with the University is required to seek resolution for our members. The graph below illustrates the range and frequency of case types that arose over the last 12 months.

As indicated in chart 1 and chart 2 (pages 11 & 12), the majority of questions and concerns this year involved appointments, leaves, workload, and promotion and tenure.

There were 22 investigation files opened in 2022, of which our members were respondents in 19. For further context, Chart 3 (page 13) provides a break-down of the types of investigations addressed this year.

Of the 7 investigations under Policy SC7: Discrimination, one involved allegations of adverse treatment on the basis of mental or physical disability, two involved allegations of adverse treatment on the basis of sex, gender expression or identity and five involved allegations of discrimination on the basis of race or ethnicity.

I would like to thank the members of the MSGC who volunteered their time to assist FA members and uphold the rights enshrined in the Collective Agreement. These are not always easy discussions but the considered and compassionate responses they brought to the table was always appreciated. Finally, I would like to thank the staff for their skilled work in assisting our members in these difficult times.

Respectfully submitted,
Bronwen Sprout
Chair

Chart 1: Case by Type, 2022

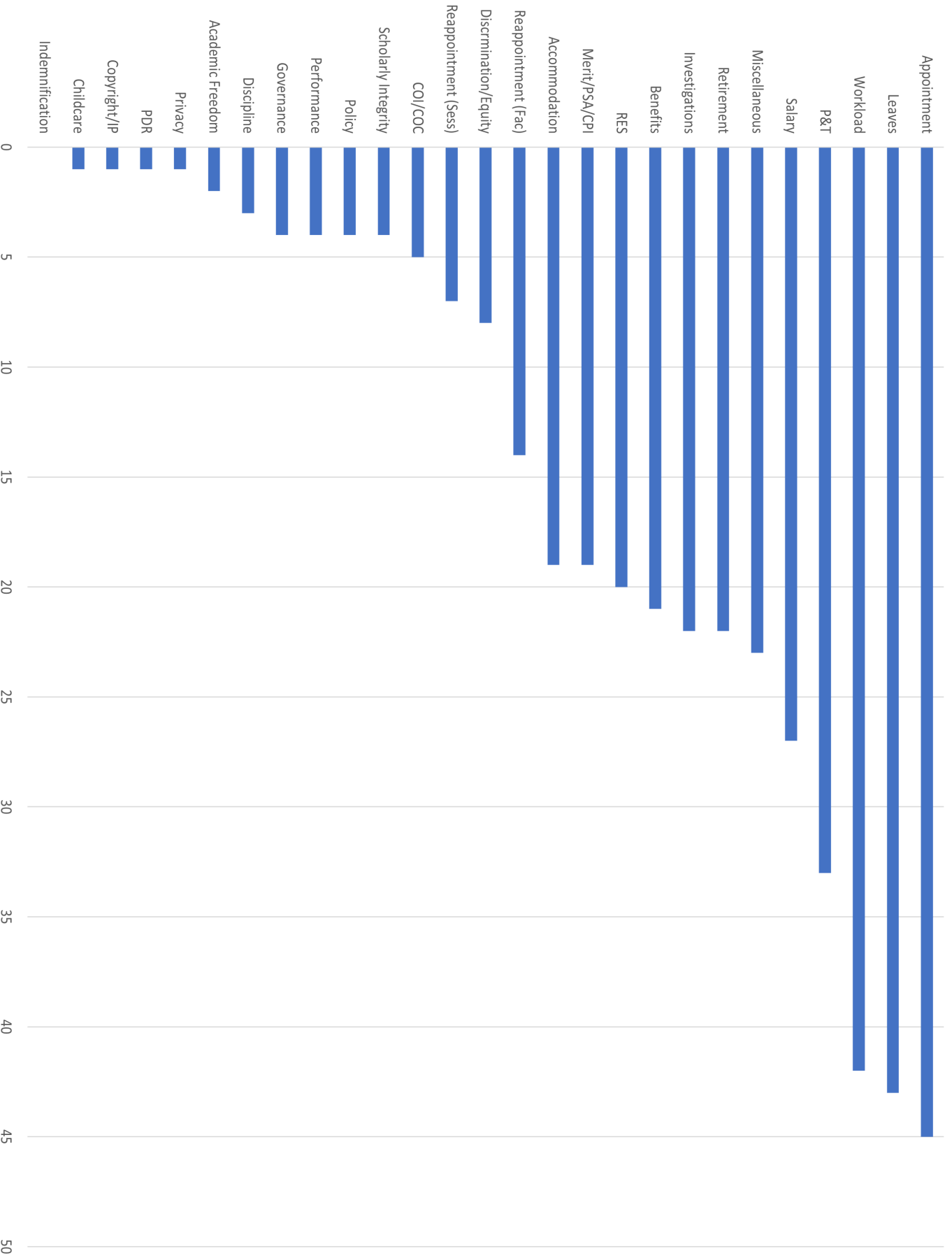


Chart 2: Case Type 2021 vs 2022

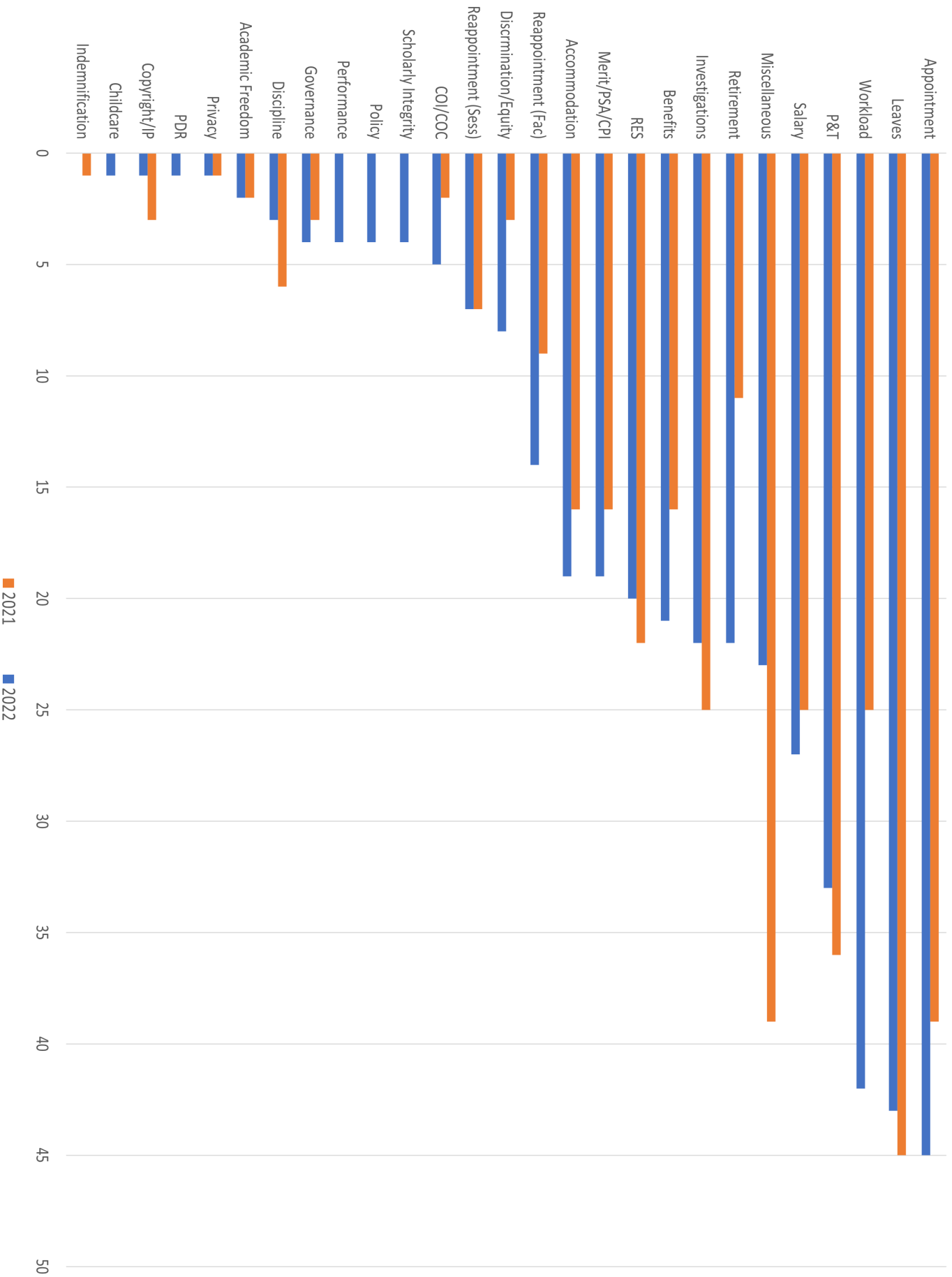
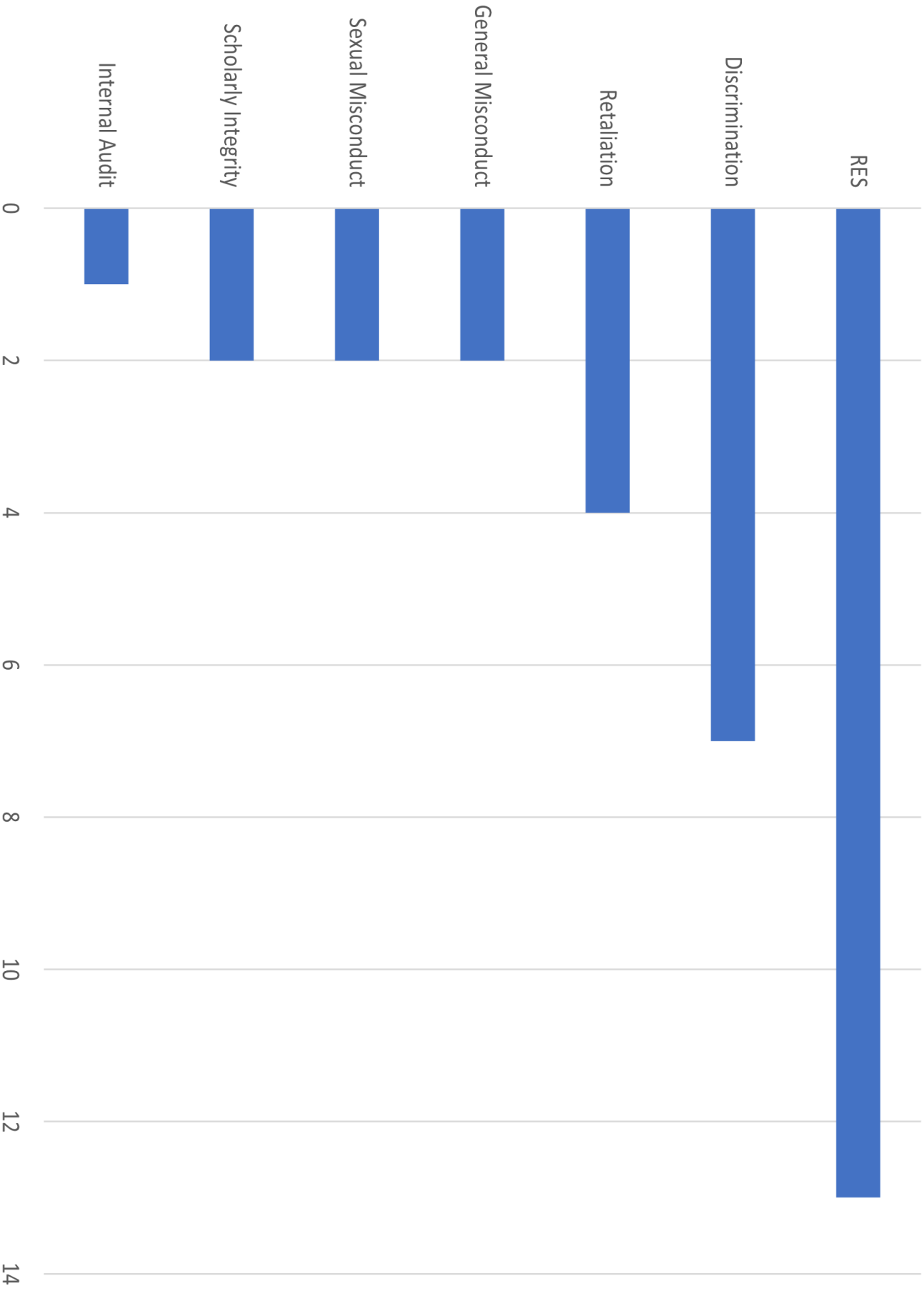


Chart 3: Investigations by Type, 2022



OFC Annual Report

Kevin Chong, Interim Chair; Okanagan Faculty Committee

I started my role as interim chair of the Okanagan Faculty Committee in January 2023, taking over from Dr. Diana Carter. Over the course of virtual meetings, the Committee participated in lively discussion of the issues of concern for UBCO members. Central among these continue to be the centralization of scheduling, workloads, navigating Workday and the lingering impact of COVID-19 on faculty and student wellness. Our members from the library brought concerns about the merit and PSA processes in the library to our attention, and although the initial comments were related to the processes in the Library, other members of the committee echoed the concerns and noted the challenges of varying approaches (submission date, forms, personal narratives) of different units. These are topics that are both unique to the Okanagan and have implications for the structure and functioning of the entire University. The Committee will continue to work to resolve these matters and bring further concerns forward to the Executive Committee.

The Committee also discussed developing an orientation package for new members to connect them with the FA and to assist them with understanding the complexities of the University environment. The OFC will continue to work to help develop a sense of community among our members on the Okanagan Campus.

Undoubtedly the highlight of my brief time as interim chair was the lunch-time meeting held for Contract Faculty that the OFC co-hosted with Contract Faculty Committee chair Sarika Bose. In that meeting, we met with contract faculty members who shared their concerns about career progression, workload, and

scheduling. Through discussion we were able to share information, advice, and support to assist our members in navigating the challenges unique to their ranks. We reviewed the history of contract faculty at UBC and the myriad rights and protections they currently have.

On behalf of the Committee, I would like to thank Deena Rubuliak and the Faculty Association staff for their expertise and support throughout the year. I also wish the best to my newly elected successor, Professor Peter Arthur.

Respectfully submitted,
Kevin Chong,
Interim Chair

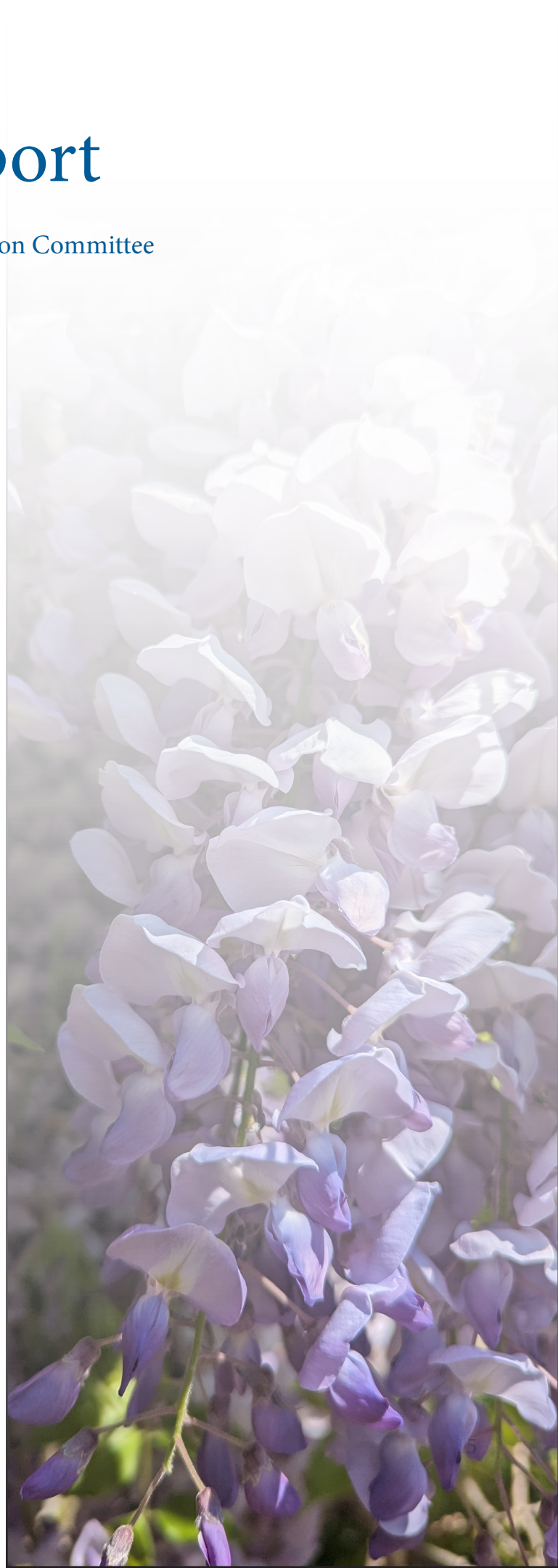
BPC Annual Report

Elizabeth Hodgson, Chair; Bargaining Preparation Committee

Collective bargaining is definitely slow food: careful preparation, lots of patience, quality ingredients, all long before we know how the dish will turn out. The 2022-2025 round has definitely followed the recipe.

Careful Planning: With the expert support of the FA staff, our Bargaining Preparation Committee began its work almost a year before table-negotiations started for the 2022 bargaining round. We held training sessions on collective bargaining; developed consultation plans and schedules; planned communications; researched our own past settlements and other national and provincial agreements; studied trends and crunched numbers; developed surveys and ran many, many consultation sessions; and tested and re-tested possible issues, proposals, and solutions. MANY THANKS to: Tiffany Potter & Anne Olsen (Associate Chairs for the Bargaining Prep Committee); Jim Johnson, Hallie Marshall, Dory Nason, Jonathan Ichikawa, Alan Richardson, Peter Arthur, Mike Law, and of course the inimitable Deena Rubuliak, FA Executive Director.

Lots of Patience: Patience was once described as “a mild form of despair, disguised as a virtue.” Nowhere has this been truer than in this round of bargaining. After spending summer and fall of 2021 in training, consultations, and planning, we developed our specific proposals early in 2022 and then waited. We waited for UBC to come to the table (more than a month later than usual); we waited for the provincial guidelines on public-sector salary-increases to emerge (many months later than usual), we waited for UBC to officially declare their salary offer (8 months after bargaining began), we waited for them to agree to an Arbitrator list (2+ months after asking).



And we waited for the money offers to approach acceptable levels. And so on. But all along, we knew that all our members wanted a good deal, not a quick one, so we were willing to be (somewhat!) patient, while also chivvying the administration team when necessary. This is a part of bargaining that's hard to report on, but the slow simmer of negotiations is both crucial and frustrating. THANKS to the Table Negotiating Team: Tiffany Potter; Anne Olsen, Hallie Marshall, Alan Richardson (past President), Dory Nason (President), Jim Johnson (Co-Chief Negotiator), and Deena Rubuliak (Executive Director).

Quality Ingredients: Here we are infinitely grateful to you, our members, for sharing your own research (on parental leaves; on student surveys; on benefits plans); for sharing your own experiences (on workload; on respect; on structural inequities); for telling us about your priorities; for coming to consultation sessions and participating on committees and advisory teams. THANKS to our Library and Lecturer advisory teams; to the members of the Joint Consultation Committee on Indigenous Scholarship; to all the FA Standing Committees who provided invaluable insights; to Heads and Directors for your lived reports on the Collective Agreement; and to the FA Executive, for your support and encouragement.

The Dish Itself: We are very happy to have concluded our slow-food bargaining with a significant helping of salary money, new rights and protections, language and money to improve equity for many of our members, significant gains in career-path options, and some long-sought workload progress. The members have now ratified this settlement which will be on the UBCFA website soon!

The Chef: After 15 years as Chief Negotiator for the UBC Faculty Association (and a long illustrious career of union leadership and collective bargaining), Jim Johnson is stepping down from the role of Chief Negotiator. A

labour economist and union expert as well as a profoundly dedicated and nationally respected negotiator, Jim has been a priceless gift to the UBCFA. We would not be where we are without him. THANK YOU, Jim!

Respectfully submitted,
Elizabeth Hodgson,
Chair and Co-Chief Negotiator

Treasurers Report

Karen Smith, Treasurer

The audited financial statements for 2022 and the 2023 budget as approved by the Executive Committee are attached to this report. Both the planned and audited figures for 2022 are shown, as is the planned budget for 2023 (NB: dollars in thousands).

Membership dues were underestimated in the 2022 budget by \$86K (line 2). The income from dues is hard to predict from one year to the next due to the fluctuations in the number of employees (new hires, retirements, members who go onto long term disability) and negotiated salary increases.

We budgeted for a surplus of \$268K in 2022, and there was a total surplus of \$1.123 million (line 41). This was largely due to reduced operational expenses resulting from uncertainty and transition from pandemic protocols. There was less travel between our campuses, to conferences, and with a continued reduction of in-person events.

The Grievance and Legal fees (line 14) were under-spent by \$370K mainly due to grievance and arbitrations being settled between the Parties prior to proceeding to a hearing.



In total, the 2023 budget allows \$1.069 million in Service to Members Expenses (line 19). The increase is in anticipation of a return to more normal activities. Collective bargaining commenced in April 2022 and the Faculty Association budgeted \$500K for related expenses, which is commensurate with bargaining expenses in previous years, and to have funds available should the need have arisen for Interest Arbitration to settle negotiations. Although bargaining has now concluded with the ratification of the new June 30, 2022-June 30, 2025 Collective Agreement, there will still be some bargaining expenses as we continued to negotiate into April of this year. The budget will also maintain a healthy cushion for grievance-related legal fees and for mediation and arbitration processes.

Operational Expenses were under budget by \$41K in 2022 (line 29), again largely due to the transitional return to in-person work. Donations (line 25) were overspent by \$4K due to the ongoing labour strife mainly affecting our colleagues back east. In keeping with the Faculty Association's donation policy in support of "trade union activism in the academic context" we were able to contribute to the strike funds of 7 Faculty Associations across Canada. Overall, Operational Expenses for budget 2023 were increased with the goal of returning to more "normal" operations.

The Human Resources budget was closely on-target for 2022. The budgeted amount for 2023 is \$1.363 million (line 37). This reflects the contractual salary increases for the Association's paid staff.

The 2023 budget calls for a net surplus of \$133K (line 41). This budget was adopted by the Executive Committee in February 2023. In keeping with previous years, the 2022 surplus amount will be invested in the Legal Reserve fund (line 44).

The Auditor's report for 2022 was completed in May 2023 by Achieve CPA, LLP. The Statement of Financial Position at December 31, 2022 indicates total funds at \$10,080,161. This is an increase to members' equity from December 31, 2021 of \$1,166,423. The Audit report was submitted without qualification.

Respectfully submitted,
Karen Smith,
Treasurer

Budget

UBC Faculty Association Budget - Adopted February 21st 2023

Line #		2022 Approved Budget	Y-T-D. for 2022	2022 over/(under)	APPROVED BUDGET 2023	Line #
1	REVENUE					1
2	Membership dues	3,690,000.00	3,603,571.02	(86,428.98)	3,720,000.00	2
3	Interest Income	2,000.00			2,000.00	3
4	Miscellaneous Revenue		-			4
5	TOTAL REVENUE	3,692,000.00	3,603,571.02	(86,428.98)	3,722,000.00	5
6						6
7	EXPENSES					7
8	Membership Expenses:					8
9	CAUT Dues	625,000.00	651,918.98	26,918.98	652,000.00	9
10	CUFA-BC Dues	300,000.00	293,571.52	(6,428.48)	300,000.00	10
11	Subtotal Membership Expenses	925,000.00	945,490.50	20,490.50	952,000.00	11
12						12
13	Service to Members Expenses					13
14	Legal Fees and Grievance/Arbitration Reated Expenses	500,000.00	129,945.66	(370,054.34)	500,000.00	14
15	Collective Bargaining Interest Arbitration Legal and Exp.	500,000.00	10,427.22	(489,572.78)	500,000.00	15
16	Member Seminars/AGM & FGM/Communications	9,500.00	1,941.67	(7,558.33)	9,500.00	16
17	Special Events	30,000.00	13,110.77	(16,889.23)	40,000.00	17
18	Standing Committee and Meeting Expenses	20,000.00	2,321.54	(17,678.46)	20,000.00	18
19	Subtotal Service to Members Expenses	1,059,500.00	157,746.86	(901,753.14)	1,069,500.00	19
20						20
21	Operational Expenses					21
22	Travel and Conference Fees/Exec PD	75,000.00	38,282.97	(36,717.03)	75,000.00	22
23	Office Expenses including IT Tech Services	40,000.00	40,978.60	978.60	55,000.00	23
24	Insurance	5,000.00	5,338.00	338.00	5,500.00	24
25	Donations	5,000.00	9,000.00	4,000.00	5,000.00	25
26	Audit and Professional Fees	15,000.00	20,240.50	5,240.50	20,250.00	26
27	Asset Purchases-Equipment	12,000.00	6,445.36	(5,554.64)	12,000.00	27
28	Leasehold Improvements	10,000.00	-	(10,000.00)	30,000.00	28
29	Subtotal Operational Expenses	162,000.00	120,285.43	(41,714.57)	202,750.00	29
30						30
31	Human Resources					31
32	Release Time	320,000.00	184,000.00	(136,000.00)	208,000.00	32
33	Staff Salaries	790,639.70	908,839.58	118,199.88	963,370.00	33
34	Staff Benefits - Taxes, PDF	146,662.28	159,783.24	13,120.96	170,000.00	34
35	Contract Office Support/Recruiting	7,500.00	602.70	(6,897.30)	2,500.00	35
36	Staff Training	12,000.00	3,412.50	(8,587.50)	20,000.00	36
37	Subtotal Human Resources	1,276,801.98	1,256,638.02	(20,163.96)	1,363,870.00	37
38						38
39	TOTAL EXPENSES	3,423,301.98	2,480,160.81	(943,141.17)	3,588,120.00	39
40						40
41	SURPLUS (LOSS)	268,698.02	1,123,410.21	(854,712.19)	133,880.00	41
42						42
43	Transfer of Funds*					43
44	Legal Reserve Fund	266,698.02	1,123,410.21			44
45	Operational (General) Reserve Fund					45
46	TOTAL TRANSFER OF FUNDS	266,698.02	1,123,410.21			46

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