

Weber State University



**Shepherd Union
Program Review
2016**

TABLE OF CONTENTS

INTRODUCTION AND ADMINISTRATIVE OVERVIEW	1
THE SHEPHERD UNION BUILDING ROLE ON CAMPUS	1
OUTLINE OF SELF STUDY	1
DINING SERVICES SUMMARY	2
MISSION, GOALS AND OUTCOMES	3
J. FARRELL SHEPHERD UNION MISSION STATEMENT	3
HISTORY	6
OUTREACH, CAMPUS RELATIONS AND COLLABORATIONS	9
LEADERSHIP AND STAFFING	12
RECRUITING METHODS	13
POSITIONS AND RESPONSIBILITIES	14
TRAINING AND PROFESSIONAL DEVELOPMENT	19
EVALUATION	20
DEPARTMENTAL REWARDS/RECOGNITION PROGRAMS	21
STAFFING NEEDS	21
FINANCIAL RESOURCES AND BUDGET	22
FACILITIES, EQUIPMENT AND TECHNOLOGY	26
ETHICAL AND LEGAL RESPONSIBILITIES	32
ASSESSMENT AND EVALUATION	34
DISSEMINATION	39
SUMMARY	39
GOALS	41
APPENDICES	42

Introduction and Administrative Overview

The Shepherd Union

THE SHEPHERD UNION BUILDING ROLE ON CAMPUS

The Shepherd Union Building is the center and hub of Weber State University (WSU) and is considered the focal point of campus. We create an environment in which everyone feels welcomed, and can find a sense of community outside of the classroom. The Shepherd Union building is the “front door” of the campus and brings together all members of the university community.

The Shepherd Union is more than a traditional student union, focused upon traditional students and their needs. The union takes pride in meeting the needs of the diverse elements of the Weber State campus and promotes a connection to the university in various ways by providing services for the entire WSU population. This vision continues to be reflected in the services housed within the union, including the Nontraditional Student Center, the Women’s Center, Hourly Childcare Center, the Testing Center, and a substantial computer lab. The union strives to meet the needs of a constantly changing and growing student population, while still holding true to the values of the traditional student union. The Shepherd Union has surpassed expectations and has become the center of the campus community. Tangible evidence includes:

1. Student usage/presence in the union in September 2014 was 164,522 and in September 2015 it was 163,044. During the nine-month academic year in 2014 1,480,698 students utilized the union and in 2015 1,467,396. Monday - Friday between 7,834 and 7,764 students visit the union a day.
2. The number of events/meetings scheduled is 12,000 – 13,000 per year including 20-25 academic conferences and approximately 17 outside campus-wide area events.
3. Summer conferences facilitate approximately 45 conferences per year.
4. Food service operates in a profitable position.

OUTLINE OF SELF STUDY

The Shepherd Union organization contains numerous departments and services that include: Union Administration; Student Involvement and Leadership; Union Finance; Union Operations; Scheduling Events and Conferencing; Wildcat Lanes/Union Recreation; Wildcard Office and Information Desk. This report includes all areas listed above with the exception of Student Involvement and Leadership as that will be reviewed in a separate self-study process. Wildcat Lanes used to report through Union Finance but has recently been realigned with SIL to create a more programmatic focus. Wildcat Lanes will be covered in this report but in the future will be included in the SIL report.

The Shepherd Union also houses several departments that do not report to the Union. The Bookstore and Copy Center report to Administrative Services. The Signpost and campus radio station report to Academic Affairs. The Computer Lab, Nontraditional Student Center, Women's Center, and Testing Center report to Student Affairs. Staff from Access and Diversity, also in Student Affairs, have a partial presence in the union. The Center for Community Engaged Learning reports jointly to Student Affairs and Academic Affairs. While these departments do not report up through the union, the services and programs they offer are an integral part of making the Shepherd Union successful and providing the services the WSU community needs. The union staff frequently interact with and work with all of the departments to make sure that the Union is meeting their needs.

DINING SERVICES SUMMARY

Weber State has a contracted food service provider, Sodexo. The Sodexo GM, Jessica Alford, reports to and works closely with the Shepherd Union Director. Sodexo currently operates 10 retail venues in the union (Lotza Pizza, Lotza Tacos, Lotza Luck, Jamba Juice, Starbucks, Quickzone, Waldo's Cheesie Grill, Waldo's Corner Pocket, Sub Connection, and the Wildcat room). Sodexo and the University have worked together to continue the solid partnership between the two entities by determining the amount of capital funds provided on level of meal plan participation.

This fiscal year (15-16) the university realized a net revenue of \$9,688.60, and retains a strong fund balance of \$322,839.33. Total retail were slightly down over the previous year (by \$55,325) and catering sales exceeded prior year sales \$77,025. Concessions had slightly lower revenue than the prior year because of a 1A – 5A tournament that was held at another venue in the spring of 2016.

Dining Services at Weber State continues to be of a consistently high quality, and is value oriented. This is reflected in the results of several assessment programs, surveys and focus groups conducted by Sodexo and the University. A Food Advisory Committee meets monthly to discuss comments by clientele and look at ways to improve service and food selections. The Union Director sits on the Food Advisory Board and works closely with that team.

Sodexo continues to partner with Weber State as an active campus partner. Sodexo has partnered with WSU Clubs and Organizations in the Food Recovery Network (FRC), which delivers surplus, unsold food at least twice per week to non-profits. In the spring of 2016, 1,706 pounds of food was donated. The aim is to ensure that surplus food feeds people, not landfills. During the month of November, Sodexo cashiers gathered \$1,514 in cash donations to give to Weber Cares, WSU's on-campus food bank. In addition, Dining Services has continued to provide a range of operations from catering events, which numbered 1,518 events with 130,737 guests served, to operating convenience stores in the Union and Stewart Wasatch Hall, nine retail operations within the Union, and providing concessions at major events and sporting events.

After eight years as the General Manager, Keith Murray accepted a position with Avalon, a Health Care Division of Sodexo. Jessica Alford, was promoted from Director of Operations to General Manager beginning in September 2015. Jessica has been with Sodexo at WSU since 2010 and is familiar with the clientele that Sodexo serves at WSU. A new Executive Chef came on board in March of 2016 and adds a wealth of knowledge and skill to the Sodexo team.

The dining services RFP is currently out to bid with a decision planned for March 2017. The Union Director meeting with the General Manager of Sodexo bi-weekly and the Sodexo team attends Union Staff meetings as well as Union weekly Operation meetings.

MISSION, GOALS AND OUTCOMES

J. FARRELL SHEPHERD UNION MISSION STATEMENT

The Shepherd Union is the heart of the campus. We foster a vibrant community through dynamic programs, excellent services and exceptional facilities that enrich the lives of Weber State students. We strive to create an environment that values diversity, is safe and inclusive, and supports the educational and personal development of the Weber State community.

The Shepherd Union Financial Services and Operations area operates under the mission, goals and value statements of the union.

Financial Services goal is to excel in the financial stewardship of the Shepherd Union with detailed, up-to-date financial records and services.

Scheduling, Events, and Conferences

The mission of WSU Scheduling, Events and Conferences (SEC) is 1) to cultivate academic partnerships by having successful programs, seminars, and conferences that positively support and enhance the economic activity of both WSU and the local community 2) to create revenue for WSU through summer conferences and 3) to create revenue through rental throughout the year with a focus on excellent customer service, financial stewardship, and active promotion.

The vision of Scheduling, Events and Conferences office is to excel in customer service, financial stewardship, and active promotion. SEC directly supports the University and seeks to stimulate community partnerships that expand the reputation of Weber State on a regional level to become a means for broader institutional development.

Weber State University Mission Statement

Weber State University provides associate, baccalaureate and master's degree programs in liberal arts, sciences, technical and professional fields. Encouraging freedom of expression and valuing diversity, the University provides excellent educational

experiences for students through personal contact among faculty, staff and students in and out of the classroom. Through academic programs, research, artistic expression, public service and community-based learning, the university serves as an educational, cultural and economic leader for the region.

The Union supports the Mission of Weber State University by providing logistical and facility event coordination for students, faculty, staff, and community throughout the school year and, especially, the summer conference season.

The union provides a personal resource for faculty, staff, students and community for planning and execution of events. For many first-time event planners and especially students, SEC provides solid support and teaches hands-on skills in preparing the logistics involved in an event or conference. SEC office, custodial, and maintenance are all involved in event planning and execution.

SEC provides the logistical support for programs for each of the areas listed above, theoretically enabling the university to accomplish its mission. Examples of this support include venue management, scheduling, policy enforcement, invoicing and marketing.

Student Affairs Mission Statement

The Division of Student Affairs promotes student learning, well-being and success through comprehensive services and programs provided in an inclusive environment. Student Affairs serves the needs of a diverse student population by offering educational experiences, leadership opportunities, and academic support, which advances the social, intellectual, cultural, and civic development of students.

The union supports the mission of WSU Student Affairs by providing logistical and facility event coordination for students, faculty, staff, and community throughout the school year and specifically the summer conference season. SEC promotes student learning, well-being and success through comprehensive services and programs provided in an inclusive environment.

SEC provides logistical and venue support for programs within Student Affairs (SA). This support focuses on physical well-being (i.e., accommodations are clean, well-managed, and comfortable) enabling SA programs to accomplish their tasks of promoting student learning and success. The union also provides support to these programs as a whole through custodial services and event setup.

Financial Services and Operations

WSU Mission Core Value I: Learning through personalized experiences and shared inquiry.

Union Finance and Union Operations support the Mission of Weber State University by providing:

- a comfortable, safe environment where everyone is welcome
- quality services for the convenience of the community.

Students learn to succeed as persons and professionals - union student employees learn lifelong skills (e.g., leadership, communication, and customer service). They are also taught crisis management, basic CPR skills and time management.

Wildcard Services/Information Center

WSU Mission Core Value I: Learning through personalized experiences and shared inquiry.

Wildcard Services and Information Center are committed to exceeding expectations and delivering the most accurate information concerning events, activities, directions and ticket sales, along with providing timely, responsive, and high quality Wildcard-related educational information and services.

Wildcard Services and Information Center provides critical support services by issuing Wildcards, which serve as the campus ID card and provides other services. Students also have access to a wide variety of information about the campus and specific programs and events at the Information Center.

Some achievements of Wildcard Services and Information Center in 2016 were:

- Approximately 3,500 bus passes were issued.
- WSU ended the year with almost 11,000 active bus passes.
- Approximately 10,000 Wildcard were issued.

Wildcat Lanes/Union Recreation

WSU Mission Core Value I: Learning through personalized experiences and shared inquiry.

Wildcat Lanes/Union Recreation supports the mission of the university and Student Affairs by contributing to the efforts of student recruitment and retention, hosting classes and clubs, offering services to meet basic student needs, and conducting formal and informal programs through which students can learn social and life skills.

Wildcat Lanes/Union Recreation is a subdivision of the Shepherd Union and contributes to the recruitment, retention, development, and education of students. This area provides the campus community with a state-of-the-art facility, with eight lanes of bowling and eight pocket billiard tables. It also offers on-campus student employment and engages patrons in classes and clubs where life skills are learned.

Custodial and Event Set-up

WSU Mission Core Value II: Engagement in community.

The custodial staff of the Union strive to provide a clean, safe and comfortable building for students to study, socialize, and interact. This helps advance the social, intellectual, cultural and civic development of students. Custodial and Event Set-up supports the mission by maintaining the venues that support the entities using the facilities. The union custodial staff creates an environment that brings together the university community and provides a clean and safe environment for WSU students to interact with the community through programs and services being offered in the union. The staff provides setups as requested, audio/visual needs, and ongoing support throughout each conference, event, program or meeting.

Student Affairs Maintenance Department

WSU Mission Core Value II: Engagement in community.

The Student Affairs Maintenance Department provides a well-maintained building that exceeds the needs of our customers. They consistently look for ways to reduce operating costs by implementing environmentally friendly technologies, and regularly perform preventative maintenance on building systems to minimize breakdowns that would inconvenience customers. Student Affairs Maintenance supports the mission by maintaining the venues that support the entities using the facilities.

Scheduling, Events, and Conferences

WSU Mission Core Value I: Learning through personalized experiences and shared inquiry.

SEC has the responsibility of direct management duties of the summer conference assistants. This group is comprised of five student assistants and one student manager. Students are taught hospitality skills such as customer service, inventory control, crisis management, event coordination, and venue logistics.

WSU Mission Core Value III: Access and opportunity for all.

SEC contributes to the economic health and development of the region by partnering with local entities, such as the Ogden/Weber Convention and Visitors Bureau (CVB), to provide venue options that would not be available without a WSU partnership. Examples of this include conferences such as World Cup Archery (400 attendees), Council on Undergraduate Research Conference (350), Sunstone Symposium (600), and the upcoming National Conference on Undergraduate Research (3,400). Each summer conference has an economic impact derived from hotel stays, restaurant patronage, and travel expenses.

HISTORY

Brief overview

The Shepherd Union has existed on the Weber State campus for more than fifty years. Porter Butts was hired as a consultant for the original project in the late 1950's. Porter Butts was president of the Association of College Unions International (ACUI) in 1932. The renovation of the Shepherd Union, which was completed in 2008, along with ongoing updates and refreshed ideas, beyond a doubt, have been the single biggest change in campus life at Weber State University.

Financial Services

The Student Life Business Office was established in 1987 to centralize the financial operations for the Shepherd Union, Dining Services and Associated Student accounts. In 1993, it was then expanded to include the financial operations for several "Student Life" departments, which included Campus Recreation and the cashiering functions for Residence Life. In 1994, the position of Associate Director of the Shepherd Union was created to directly support the Union Director and to oversee the Student Life financial operations mentioned above. As the Student Life/Student Affairs leadership changed, financial operations for Campus Recreation, Food Service and Housing were decentralized. Some financial functions are performed through the Information Center (cash deposits). The cash handling activities performed by the Information Center are only related to Wildcard, buss pass, meal plans, and tickets for a few events. The accounting functions for the Union and Student Involvement and Leadership are handled by the Union Finance Manager. Monika Rodie was the long-time Union Finance Manager. After Monika retired in the summer of 2016, Daniel Godoy, was hired as the new Finance Manager.

Wildcard Services/Information Center

An identification card has existed on campus for many years. The early card was a simple card, comprised of a student photo, taken with a Polaroid camera, laminated on a card stock paper. It was used at the library, gym, and athletic activities to identify the students who were eligible for specific services.

In the mid-1990s, American Express Special Teams was the first carding system used on campus. This system provided a very simple declining balance option used for dining service meal plans, and was used until 2003.

In 2003, the first Blackboard system was purchased and implemented on campus. Due to the fact that carding systems had advanced in technology, many more services were offered. At that time, the cash registers in the dining areas had the first point of sales technology, expanded options for declining balance funds, and credit card options. As technology has increased, the services offered by the carding system have expanded to include the bookstore, vending machines, campus computer lab printing, door access, online card options, advanced declining balance account options and advanced reporting options. In an effort to keep up with the fast pace and changes in technology and in the higher education environment, the Wildcard Services and Information Center is always looking to improve services, programs and education for our campus. Our goal is to provide the campus community with what they need and

want. Over the past few years, we have implemented several new programs and processes, using updated training and technology.

- **ID card Printers** – Implementation of new Data Card ID printers, which are durable for large amounts of printing, have the ability to print quickly and import prox card numbers into our database. This allows us to issue the campus Wildcards in a more efficient manner. One struggle was issuing ID cards to new student orientation groups. These new printers now allow us to issue cards in a shorter amount of time and with more accuracy.
- **Lost and Found Software** - Implementation of a new lost and found software to replace the old system of using paper and pen. This has allowed us to provide improved customer service by being able to quickly pull up descriptions and photos of lost items. This creates a more organized and accurate process and gives us the ability to get lost items returned to the proper owners in a shorter amount of time.

Wildcat Lanes/Union Recreation

Wildcat Lanes/Union Recreation, originally called Wildcat Lanes (WCL) opened for business in 1961, with the completion of phase one of the J. Farrell Shepherd Union. Since that time, the facility has hosted Physical Education classes for bowling and billiards. Over the years, the center has undergone numerous renovations of varying scopes with two extensive remodels. The first remodel happened in 1985, with the addition of new Brunswick A-2 pinsetters, underground ball tracks and lifts, new settee furniture and automatic scorers. In 2006-2008, with the Shepherd Union's total renovation, the following equipment was added: synthetic lanes, new seating, ball racks, automated bumpers, Steltronic automatic scoring, and black lights for the bowling area. The billiard area was reconfigured and enlarged with special over-table lighting, a shuffleboard table added, and the Lair meeting room was created adjacent to both the bowling and billiards areas to accommodate food and party groups. In 2016 the space was renovated to include a new late night dining venue. This project was driven by the Union Board, and the new space, Waldo's Corner Pocket, opened in the spring of 2016.

Fred Meaders, a long-time Wildcat Lanes/Union Recreation Manager left in the spring of 2015. For all of 2015 Wildcat Lanes/Union Recreation was run by a graduate student and student employees. A new full-time Manager was hired in September of 2016 but he left the position in early December.

Waldo's Corner Pocket was designed and constructed with the goal of activating the union in the evening hours. This beautifully renovated space allows students to order freshly cooked bar foods, prepackaged meals, and select drink options from a custom soda menu between 5 p.m. and 9 p.m., Monday through Friday. In partnership with Wildcat Lanes/Union Recreation, Weber Dining has created bowling party packages, event specials and nightly deals. Waldo's Corner Pocket is a programmable space appropriate for open-mic nights, watch parties, karaoke nights and other special events. Waldo's Corner Pocket opened for business in February 2016, and the Grand Opening event was held on September 7, 2016. In 2016 this area was moved under Student Involvement and Leadership to further promote student learning in the space through programming.

Union Custodial and Event Set-up

On September 25, 1961, the dedication of the union took place. The building was known as the Temporary Union Building or "The TUB." At that time, the first two custodians were hired to take care of the facility. The building has grown since that time and now contains several event spaces, such as multi-purpose and ballrooms; lounges and study rooms; and services for students. With this growth, the custodial needs of the building have also changed. The custodial department has gone from the initial two full-time custodians to the current staff of fifteen (eight full-time and seven hourly students).

Scheduling, Events, and Conferences

The Scheduling, Events and Conferences department began in early 1980 with a staff member whose sole responsibility was to schedule the Shepherd Union. Around this same time, a growing conference market necessitated the creation of another position with the primary task of coordinating the operation of conferences. These two offices continued independently of each other until 2001 when the two departments merged. The newly created Scheduling, Events, and Conferences office operated solely as a service entity. In 2004, a manager was hired with the directive to increase marketing efforts and transition the office from a service entity to a business entity.

In 2015, with the arrival of a new Union Director, the management of the Scheduling, Events, and Conferences office was realigned with the Associate Director. Since that transition, communication has increased within the department and across campus. The reservation process has been streamlined, and the facility use policies are currently being reviewed to reflect current practices and increase revenue. The number of bookings has been stable in the last four years, after a strong growth of 14% from 2012 to 2013.

OUTREACH, CAMPUS RELATIONS AND COLLABORATIONS

Financial Services

The Union Finance Manager works closely with all departments within the Union and Student Involvement and Leadership (SIL). The Union Finance Manager has strong relationships with all areas of Student Affairs, Accounting Services, Purchasing and Internal Audit. This position also helps train student leaders regarding financial policies and procedures.

The relationships with Accounting Services and Internal Audit have strengthened over the years. Because the Union and SIL's financials are monitored closely, areas of concern are addressed quickly before they become serious. Accounting Services personnel are quick to respond to inquiries about account balances and transactions, or adding new indexes for student clubs and organizations. Internal Audit has found few areas of concern in past audits, which can be attributed to the strong working relationships that have been formed.

Wildcard Services/Information Center

Wildcard Services/Information Center has very strong collaborations with several departments on campus: Student Affairs Technology (Blackboard support), Accounting Services (Wildcat Cash reconciliations), Orientation, Human Resources and Facilities Management (issuance of Wildcards and “prox” cards), International Students and Scholars Center (Wildcard issues), Sodexo (account reconciliations), WSU Information Technology (database support), and Cashier’s Office (fund deposits). Wildcard Services also works very closely with its counterpart at Davis to ensure that as many services as possible are accessible at both campus locations.

Every year Wildcard Services takes a full page ad out in *The Signpost* to promote the purchasing of an ID card for new students. Wildcard Services and Information Center also work frequently with new student orientation. In 2016 Orientation began a mandatory program for all new students, which has increased the number of Wildcards purchased.

Wildcat Lanes/Union Recreation

Wildcat Lanes/Union Recreation work in collaboration with the HPHP Department and Continuing Education to schedule, develop curriculum, and hire qualified adjunct professors for bowling and billiard classes. Wildcat Lanes/Union Recreation is working to build collaborative partnerships with the campus community (e.g., WSUSA, Nontraditional Student Center). Wildcat Lanes/Union Recreation is engaged with the WSU Club Sports program and with the Bowling and Billiard Clubs. The Wildcat Lanes/Union Recreation Manager is the supervisor of all student employees in WCL/Union Recreation and oversees the programming and events hosted in Waldo's Corner Pocket.

Wildcat Lanes/Union Recreation works with local retailers to provide coupons to the community. For the past two years it has run advertisements with Groupon to promote both bowling and billiards to the community at large. Ads are also run frequently in *The Signpost*, and work is done with Housing and Residence Life to promote Wildcat Lanes/Union Recreation activities and programs.

Student Affairs Maintenance

The Shepherd Union handles custodial and maintenance differently from most departments on campus. Most other buildings and departments use Facilities Management for the cleaning and maintenance of their buildings and/or offices. Instead of going through WSU Facilities Management, the union manages its own custodial and event set-up crews whose main responsibilities include cleaning and preventive maintenance (coordinated with other departments). In addition, the union shares maintenance services with Housing and Residence Life. Called Student Affairs Maintenance, this team performs electrical, plumbing, carpentry,

system controls and other trade work for both housing and the union. This team also provides most of the maintenance for the bowling lanes and bowling equipment.

The Student Affairs Maintenance Department works closely with Residence Life staff, Union staff, Wildcat Lanes/Union Recreation, Campus Facilities Management, and other departments within the Division of Student Affairs. When a major project is underway, the Student Affairs Maintenance Coordinator works closely with the project manager and campus area managers for that project. The Associate Director of Operations works as the liaison between housing, Student Affairs, Facilities Management and the construction company staff.

In the summer of 2015, Student Affairs Maintenance took over maintenance of the bowling equipment/machines at Wildcat Lanes/Union Recreation. A member of the department attended a three-week training hosted by Brunswick Bowling Company and became certified to repair our equipment. Wildcat Lanes has now hired a part-time mechanic to do regular maintenance on the bowling equipment.

Scheduling, Events, and Conferences

Scheduling, Events and Conferences actively promotes the Shepherd Union and surrounding areas as a unique venue for meetings and conferences. SEC advertises primarily through its website, but benefits from strong word-of-mouth among students, faculty and staff who have used its services and recommend them to others. Students are recommended to our office by advisors and faculty. SEC has been involved in large conference bidding without competing directly with local conference centers and hotels. The SEC office has recently starting working the City of Ogden and local downtown Hotels with overflow bed space needs and shuttle services between downtown the University Campus.

SEC works with every entity within Student Affairs to provide logistical and facility support for Student Affairs departments. Examples of this include support for Clubs and Organizations Carnival (Student Involvement and Leadership), Career Fair (Career Services), Multicultural Youth Conference (Access and Diversity), and WSU Gear Swap (Campus Recreation Outdoor Programs).

SEC collaborates extensively with departments outside the Division of Student Affairs. In addition to logistical and facility support for events and conferences, the SEC provides assistance in preparing bids for conferences related to faculty and staff. Examples of this type of collaboration include: National Council for Undergraduate Research , (WSU Office of Undergraduate Research), American Legion Boy's and Girl's State (WSU Political Science Department), and the MESA 2016 National Competition (College of Engineering, Applied Science & Technology).

SEC works with many outside entities, both for-profit and not-for-profit, to provide ideal conferencing services. Such groups include Home Depot, Marriage Conference, Hill Air Force Base, Especially for Youth, and Chinese Christian Church.

Our vision is to become the top-choice for university/collegiate conferences in northern Utah. SEC will become a profitable, self-sustaining entity that complements the mission of Weber State University.

The Shepherd Union Board

The Shepherd Union has a Board comprised of key customers and stakeholders of the union. This group includes faculty, staff, two vice presidents, the Dean of Students, and student members. The Union Board is chaired by the Union Director and the WSUSA Diversity Vice President. The role of the board is to serve as an advisory committee to the Union Director and staff members by providing information, comments, and constructive feedback about proposals. Most often this group is consulted about construction projects, remodels, new furniture selection, and other large purchases. The Union Board also makes recommendations on policy changes, usage of space within the Shepherd Union, and policy exceptions. In 2016 the board worked to create Union Board bylaws and increased structure and accountability. While the board is strictly an advisory board, its role is extremely important in both advising the Union Director, as well as sharing information from meetings with the campus community. The board meets bi-weekly and membership is based on recommendations from the Faculty Senate, student government, and input from the chairs (see Appendix A board members also By-Laws)

LEADERSHIP AND STAFFING

Shepherd Union Staff Structure

The Shepherd Union's staff structure (see appendix E) is discussed below. In brief, the Union Director works with the management team that oversees areas of the union. The management team meets weekly and includes the Director of Student Involvement and Leadership, the Finance Manager, the Sodexo General Manager, the Associate Director of Operations, the Coordinator of Wildcard Services and Information Center, and the Union Administrative Associate. The Director of the Union holds an "All-Staff Meeting" for all other Shepherd Union staff members. This meeting is designed to give each employee an opportunity to voice his or her opinions, concerns, and department-specific issues. In all, the Shepherd Union employs 21 full-time staff members plus approximately 75 food service employees, and 30 student employees (outside food services).

Departments	Full Time Employees
Union Administration	2
Associate Director	1
Finance Manager	1
Wildcard Services/Information Center	2
Custodial	7
Maintenance	5
Scheduling Events and Conferencing	2
Wildcat Lanes/Union Recreation	1

Having maintenance, custodial and events report directly to the union provides increased responsiveness and efficiency in conflict/crisis management. In essence, the Shepherd Union custodial and event set up crews are much more than basic custodians or facilities maintenance staff members. They develop skill sets in audio and visual work, customer service, and are key members of the union in providing an excellent experience for all patrons visiting WSU.

RECRUITING METHODS

The Union experienced much change between 2015 and 2016. After many years of consistent leadership, the union saw a change in 2015 when a number of long-time Union staff left WSU. These included Director Bill Fruth, Associate Director Monika Rodie, Associate Director Chad Mosher, and Director of Student Involvement and Leadership Aaron Newman. Recruitment of full-time staff is done primarily through nationwide searches.. Many higher education organizations are used to advertise positions including ACUI, NASPA, NACA, and many others.

The challenges in recruiting quality staff have been mostly related to pay and location. While Utah is a beautiful place, it presents some recruitment issues in terms of climate, pay, and location. Although Weber State has great benefits, so do other state institutions, and the pay at Weber is not line with the pay being offered by other universities. While great hires were made in all of these positions, it has become clear that, in order for Weber to compete for quality staff, the institution needs to take a closer look at its salaries.

SEC has recently taken on the supervision of the student building managers. They have completed a successful hiring process and hired three new building managers and three student office assistants. Summer assistants are usually culled from student leadership. This has proved to be an excellent resource for employees as the students are familiar with many of the procedures of the union and tend to have excellent customer service skills.

POSITIONS AND RESPONSIBILITIES

Below, we have outlined the responsibilities of each of the exempt, non-exempt, and hourly positions in the Union.

Union Administration

Union Director: Responsible for the overall operation of the Shepherd Union. Oversees Scheduling, Events and Conferences office, Student Affairs maintenance, Union custodial and set up, Student Involvement and Leadership, the Union Financial Manager, and Dining Services. Ultimately responsible for the fiscal health of the Shepherd Union and the safety and security of the building.

Qualifications: BS or BA Degree; seven years full-time direct or comparable experience; proficient in Microsoft Office Systems; basic accounting skills; strong hospitality background; ability to work in high pressure situations; strong customer service skills; contract negotiation skills; marketing skills; creative event planning; strong organizational skills; ability to multi-task; sales skills; communication skills.

Associate Director of Operations: responsible for the oversight of Scheduling, Events and Conferences as well as Custodial/Setup team, and Student Affairs Maintenance. Is second in command and is the back-up to the Union Director in emergency situations. This is a full-time professional staff position. Maximizes use of the union, housing, food services and other campus venues during the summer and academic year through on and off campus marketing initiatives; manages program, processes and staff for scheduling and coordination of delivery of services required for successful events and conferences; is responsible for overseeing all accounting and billing associated with the office; develops and implements ongoing business plan, including fee schedules and direct costs, for office; develops and implements operating procedures for ensuring efficient and effective delivery of services; trains and manages staff for delivering a high level of customer service to all clients and customers of the office at all times; is responsible for assessment processes of services and operations.

Qualifications: BS or BA Degree; three years full-time direct or comparable experience; proficient in Microsoft Office Systems; basic accounting skills; strong hospitality background; ability to work in high pressure situations; strong customer service skills; contract negotiation skills; marketing skills; creative event planning; strong organizational skills; ability to multi-task; sales skills; communication skills.

Financial Services and Operations

Financial Manager, Shepherd Union: Responsible for all finances and operations in the planning, coordinating and directing financial, retail and operational areas of the Shepherd Union. Ultimate supervisor of the Information Center and the Wildcard program. Coordinates and assists in the development and monitoring of Shepherd Union and Student Involvement and Leadership departmental budgets.

Qualifications: Bachelor's degree in accounting/business related field. Three years of experience in accounting and/or budget management. Master's degree in higher education/student affairs, MBA, or closely related field of study. Three years of experience in student union management. Two years of supervisory experience.

Wildcard Services/Information Center

Coordinator of Information and Wildcard: This professional position is charged with the management and supervision of day-to-day technical and financial operations within the Weber State Wildcard - One Card program (ID) cards, Wildcard Services/Information Center.

Qualifications: Bachelor's degree. Computer information technology including software and hardware. Accounting. 3 years management or comparable and 5 years accounting experience.

Office Assistant/Wildcard: This classified position is responsible for supervising and providing leadership for the operations of the Shepherd Union Information Center. These operations include WSU Wildcard ID production, troubleshooting, campus lost and found, special event ticket sales, university information, UTA Ed Passes, and training for students working in the area.

Qualifications: Associate degree or equivalent. 3 years minimum front-line customer service experience. Supervisory and cash handling experience.

Student Accountant: This position works in cooperation with the Coordinator to complete all accounting responsibilities including preparing daily cash reports, delivering cash and reports to the University Cashier's Office, counting the funds in the safe and logging totals, preparing monthly funds transfers, preparing invoices and billings, and researching and correcting any errors in a timely manner. The Student Accountant may be also be asked to act as backup when needed at the Information Center.

Hourly/Student Information Desk Attendants: Responsible for opening and closing Wildcat Services/Information Center, handles cash according to campus cash handling policies, provides campus information regarding programs and events, and issues Wildcards to qualified students, faculty, and staff.

Wildcat Lanes/Union Recreation

Manager of Wildcat Lanes/Union Recreation:

The manager of Wildcat Lanes is responsible for consistent, weekly programming within the Union Recreation, Billiards, and Wildcat Lanes area. Schedule various activities, trivia challenges, open mic events, etc. to activate the space and increase traffic flow and usage of the Union Recreation Center and Wildcat Lanes. The manager is also expected to create and execute a creative, multi-faceted marketing campaign for the Union Recreation Center and

spread it through the WSU campus community as well as the surrounding Ogden community. Foster an exciting, energetic and collaborative environment for students and the broader campus community by activating the Union Recreation Center. Lastly, the manager is expected to maintain frequent communication with Union Administration and Student Involvement and Leadership colleagues, as well as key WSU constituents such as Residence Life staff and students, Student Affairs departments and programs as well as the entire campus community. They also oversee the student staff within the Union Recreation Center and Wildcat Lanes.

The manager is expected to maintain frequent communication with Union Administration and Student Involvement and Leadership colleagues, as well as key WSU constituents such as Residence Life staff and students, Student Affairs departments and programs, as well as the entire campus community. Oversees the staff within the Union Recreation Center and Wildcat Lanes.

Qualifications: Bachelor's degree in Business Management, Recreation/Sport Management or related field or equivalent combination of education and work experience, along with event planning experience and/or programming experience (or transferable experience and/or skills), basic audio visual skills, experience programming in a college setting or event planning experience, and experience in using social media for marketing and promotion purposes.

Hourly Student Customer Service/Cashiers: Work the service counter, monitor bowling lanes and billiard table usage, deal with all retail drinks and snacks. The hourly Student Customer Service/Cashiers are also trained to repair minor pinsetter delays or problems and provide support to patrons with automatic scoring system.

Student Office Aide: Assists coordinator with office support for the bowling and adjunct instructors, completing daily cash reports and taking them to Cashier's Office.

Student Billiards Coordinator: The liaison for WCL/Union Recreation with the Billiard Club, performs all maintenance, leveling of billiard tables and shuffleboard table and cares for the house cue sticks (replacing tips, etc.) and other maintenance as needed. Organizes and runs tournaments during the semester and works with all customers desiring to purchase and/or order custom cue sticks or other billiard products.

Hourly/Student Center Mechanic: The center mechanic maintains the pinsetters, automatic scorers, lanes and lane machines, bumpers and other equipment. This position maintains a spare parts inventory. If qualified, this person also supervises the customer service training of the student employees - certifying them in safe repair standards and procedures for their pin chasing duties.

Custodial and Event Set-up

Custodial Supervisor: This Classified position is responsible for the scheduling, planning and supervising of the custodial department. The Custodial Supervisor develops and assures adherence to quality and quantity standards and designates shifts and work assignments for the custodial department. The Custodial Supervisor works with custodial leads in the

selection and hiring of full-time and hourly custodial staff, conducts performance evaluations on all custodians under his/her supervision and is responsible for the budget for the custodial department. When the custodial leads are absent, the Custodial Supervisor will work with the staff for event set ups and technical audio visual support for Shepherd Union events.

Custodial Leads: There are two lead positions at this time which are both classified positions. One supervises the night/morning crew (1:00 a.m. - 9:30 a.m.) The other lead supervises the day/early evening crew (9:30 a.m. - 5:30 p.m.). Serving as the leader for their assigned shift for daily cleaning, event set up and support. The leads conduct on-the-job training for new hires assigned to their shifts and assist the Custodial Supervisor for coverage in his/her absence.

Custodians: There are three custodial positions at the Shepherd Union, each with a specific area of responsibility. Overall basic custodial duties include: sweep, mop, clean restrooms, vacuum, etc.). Custodians assist in event set ups and audio/visual support, lock and unlock rooms as requested and report malfunctions for equipment, fixtures or damage to rooms and furnishings to the custodial leads or supervisor. These are classified staff positions.

Hourly/Student Custodians: Hourly/student custodians have assigned areas, shifts and duties depending on the time-frame of their shifts. Basic custodial duties include: sweep, mop, clean restrooms, dining areas, etc.

Student Affairs Maintenance

Student Affairs Maintenance Coordinator: This position is responsible for the scheduling, planning and supervision of the maintenance department for the Shepherd Union, Residence Halls and the University Village. The Coordinator ensures that all buildings systems, including electrical, mechanical, and HVAC are working properly. Develops and assures adherence to quality and quantity standards. The Coordinator designates shifts and work assignments for maintenance staff and conducts performance evaluations for all maintenance positions. Also, serve as liaison between the University and outside contractors, Campus Facilities Management and other Student Affairs Departments ensure all contracts are honored and that the University's interests are maintained. This is a professional staff position and includes budgetary responsibilities and oversight.

Student Affairs Maintenance Trades staff: The department has a designated electrician, plumber/HVAC person, and painter/carpenter. All of the staff are cross trained to some degree to be versatile within the department. These are classified staff positions.

Hourly/student Maintenance Helper: These positions help the full-time staff as needed.

Hourly/Student Receptionist/Secretary: Maintain departmental records, answer phones, log work orders. Basic secretarial duties.

Scheduling, Events, and Conferences

Associate Director Operations: see description listed under Union Administration.

Student Building Managers: Ensure the effective operation of the Shepherd Union during the hours 4:00 p.m. to midnight when full-time staff are not typically on duty. Duties include providing the highest level of customer service, helping with event set-ups and enforcing the policies of the Shepherd Union and Weber State University. Student Building Managers open and close the building as needed.

Conference Services and Outside Area Scheduling Liaison: Facilitate scheduling services of the union and the efficient planning for and delivery of related services including: audio-visual, technical, room set-ups, food service and other requested items. Facilitate scheduling of conferences by university and non-university groups using university facilities and required services and additional resources. Work with designated customers for the delivery of efficient and quality meeting, event, and conference services taking place in the union or elsewhere on campus. Utilize and practice Shepherd Union and University policies and procedures with practices that promote safety, and decrease liability concerns. Provide facility and service scheduling for daily use in the union and related venues; facilitate delivery of services at events, programs, and conferences/customer service; central coordination of all outside area scheduling, classrooms and lab areas; provide information as required to university services (Facilities Management, Campus Police, etc.).

Qualifications: BS or BA Degree; three years full-time direct or comparable experience; proficient in Microsoft Office systems; basic accounting skills; strong hospitality background; ability to work in high pressure situations; strong customer service skills; contract negotiation skills; marketing skills; creative event planning; strong organizational skills; ability to multi-task; sales skills; communication skills.

Scheduling Coordinator: Manage scheduling services of the Shepherd Union and the efficient planning for and delivery of related services, including room rental, contract negotiation and logistics on a daily basis. Additionally, facilitates communication between audio-visual, setup and catering personnel. Provides assistance oversight, and scheduling to student assistants.

Qualifications: BS or BA Degree; 3 years full-time direct or comparable experience; proficient in MS WORD office systems; basic accounting skills; strong hospitality background; ability to work in high pressure situations; strong customer service skills; contract negotiation skills; marketing skills; creative event planning; strong organizational skills; ability to multi-task; sales skills; communication skills.

SEC Office Assistants: Responsible for maintaining on campus calendaring system and educate calendar end users. General office duties such as answering phone calls, emails, and greeting guests/customers. Also be able to determine specific needs for events and become familiar with office and university policies and procedures.

Summer Conference Assistants: Responsible for day-to-day logistics of summer conferences for the months of May through August. Duties include: housing check-in and check-out, interaction between multiple departments such as: dining services, parking, Shepherd Union, Facilities Management. Will require being on-call during events. A Summer Assistant Lead is also selected to coordinate schedules and order materials.

TRAINING AND PROFESSIONAL DEVELOPMENT

New contract staff participate in mandatory WSU new staff orientation with Human Resources on their first day of employment. New staff are invited to attend the Human Resources New Employee university program (<http://www.weber.edu/newemployeetraining/new.html>) and are also invited to a new staff orientation for the Division of Student Affairs. The WSU new employee trainings are each offered once per month and staff must complete all of the programs within their first three months. The Student Affairs Division orientation is held once per semester..

Student employees are trained by their supervisors and/or peers. An all-staff training is held annually at the beginning of fall semester. Individual departments then hold more intensive training following the all-staff meeting. Union student employees also participate in Get Set training, offered by the Division. Because of the turnover with the hourly custodial staff, on-the-job training has been the most effective as staff are trained in their specific area.

All departmental training manuals are in the process of being revised. These items haven't been revised since 2011, but as a part of the current strategic plan, they will be reviewed along with all the union policies.

The union provides an all-staff meeting once a month, which usually incorporates a training component (i.e. new policies and procedures, risk management training, technology update, etc.). At the beginning of each academic year, a training is held for all staff, student and contract workers to discuss new policies and procedures as well as other pertinent items. Each department then holds individual training in their areas. If needed, staff training is also held in the spring semester.

The Union budgets for department head travels for an annual and regional conference for the Association of College Unions International (ACUI). These conferences are seen as valuable professional development resources. Other staff members are encouraged to attend at least one regional conference or training yearly and if the budget allows, they may also attend a national conference.

The Union has a yearly all-staff retreat where goals, policies, and training are communicated. This is used as a chance to celebrate our successes and develop plans for new practices.

Wildcard Services and Information Center

Training for staff encourages self-directed activities focusing on giving maximum opportunity for self-realization and for growth in individual, social competency and group effectiveness. Regular staff training provides the opportunity to share and collect information on how to improve services and make them more effective. Each individual is encouraged to provide feedback and suggestions on what is working well and what could be changed.

Student Affairs Maintenance

The department, as a whole, regularly attends training with other maintenance technicians in FM on campus. The university's Facilities Management Department holds training sessions each Friday morning covering a different topic related to maintenance. This is the first year the Student Affairs Maintenance staff has participated on a regular basis. All members of the department also attend the Union All-Staff Meeting monthly.

Scheduling, Events and Conferences

New employees attend a University Orientation and SEC encourages participation in additional trainings such as Higher Education Academy, Student Affairs Academy, Student Affairs Orientation, and Customer Service trainings. Additional trainings are scheduled as needed (i.e. EMS Users Training). Staff are also encouraged to take advantage of courses offered through the Office of Workplace Learning (OWL).

The goal is that SEC will be able to demonstrate that student summer assistants learn skills that may translate into professional success. A meaningful indicator of achievement in this area would be demonstrated through successful completion of both objective and subjective assessments. SEC students also participate in the union-run student employment program.

Shepherd Union Student Employment Training

Student employees participate in Get Set training, offered by the Division, but also participate in Union employee training. All student employees are expected to participate in this training program. This program was created in the spring of 2016 and is entering its first full semester of implementation. The Shepherd Union Student Employment Committee (SUSEC) is committed to providing on-going trainings and guidance for all student employees within the Union Building. Through these experiences and engagement opportunities, student employees will feel empowered in their positions and be knowledgeable of the expectations Union Administration has for all student employees. In addition, the SUSEC will offer a variety of personal and professional development opportunities to student employees, and will ensure the necessary tools and resources for leadership development are readily available and transferable for all. It is the goal of the SUSEC for student employees to understand the value and necessity of providing a consistent level of quality customer service to all who visit the Union, and to have confidence in representing the Shepherd Union community and Weber State University.

EVALUATION

All Union full-time exempt staff are evaluated once a year using the University PREP Program (Performance Review and Enrichment Program), which is conducted in the spring. Staff members are required to list their main accomplishments for the prior year and their goals and objectives for the coming year, which are discussed with their immediate supervisors. Most of the Union Staff evaluation is done through the University's PREP process. The Union Director meets bi-weekly with all direct reports and discusses areas of success and areas for improvement.

Student Employee Evaluation

The union is currently working on expanding our student employee evaluation process. This process is designed to provide both an evaluation and discipline process that will guide the student employee and the supervisor. Specific conduct and behaviors will be evaluated by the supervisor, and, a self-evaluation by the student will be completed. The outcome of these evaluations will then be used as a learning opportunity to increase job skills, such as customer service, communication and time management.

DEPARTMENTAL REWARDS/RECOGNITION PROGRAMS

Currently, there is not a formal union employee recognition program. At one time the union had a program called UROCS (Union Recognition of Outstanding Customer Service), but the program lasted only a few years due to difficulty in getting nominations. Union contract employees can be nominated for the University Outstanding Staff Awards. Union contract and student staff can also be nominated for the Division of Student Affairs annual awards. Student Affairs also has a program for recognizing outstanding service through the “Builders of Excellence” awards, which allows contract staff to be recognized by their peers and the Vice President of Student Affairs. Employees can also be recognized by the University through the Customer Service PRIDE awards, which acknowledge outstanding customer service through the “Mystery Shopper” program held each October.

Every month at the union All Staff Meeting a “Captain of the Month” is named. The “Captain” gets to keep the trophy for a month and returns it the following month. Each month anyone in the department can submit a nomination, and then the Union Director selects a winner. The trophy has traveled to all departments within the union this year. The departments also have monthly luncheons and occasional celebrations. In addition, the Leadership Team has a “birthday buddy” program designed to make sure everyone’s birthday is celebrated in staff meeting.

Wildcat Lanes/Union Recreation hourly employees may earn recognition as the “Employee of the Month,” where their name goes on a prominent plaque displayed at the service counter, and they receive a \$25 Wildcard reward for use on campus. Union Custodial has implemented a similar award with their “WOW Awards” (What Outstanding Work).

STAFFING NEEDS

All departments are fully staffed at this time. One full-time custodial position has been left open, by choice, due to budget constraints. Hourly labor is currently being used to backfill for this position. Also due to budgets, the position of a full-time mechanic in Wildcat Lanes/Union Recreation has been eliminated. In 2010, this caused some issues for the Coordinator of Wildcat Lanes/Union Recreation; however, we are using part-time labor to fill in the gaps. At this time, the use of an hourly position to cover the mechanics appears to be working.

The current structure of the custodial staff doing both building cleaning and event set up isn't conducive to the union's needs. Some employees must work events and custodial simultaneously. This has often led to neglecting certain cleaning responsibilities in order to break down and set up events. When the building is very busy and there are large turnarounds, custodians must shift their attention to setups, and the cleaning needs of the building are often put on the back burner. If two more full-time custodians could be hired, some of our current team could be transitioned to events managers and two separate positions could be created. As the building ages, the cleaning becomes more frequent and more time consuming and custodial needs are much greater than they were in 2008 when the building opened. Since 2011 there has been a growth in the number of events hosted (see appendix D), but no growth in custodial or event staff.

Over the past two years it has become apparent the union needs to streamline its marketing efforts. In order for the facility to generate revenue both in conference services and in Wildcat Lanes/Union Recreation, the facility needs to improve promotional efforts through revised marketing strategies including new logos, updated materials, a more solid web presence, and a responsive social media program. Currently, all areas of the union (including SIL), operate their own accounts and as a result, the messaging isn't clear or consistent. Conference Services hasn't developed new material since 2011 and most departments don't have any social media presence. In order for the union to stay relevant in the university community and beyond, it needs to have a marketing and social media manager. This position is desperately needed and will keep the union relevant in the minds of students, faculty, and staff.

FINANCIAL RESOURCES AND BUDGET

Beyond personnel expenses, the Shepherd Union had in the 2016 fiscal year an operating budget of \$1.3 million. The Department of Student Involvement and Leadership's 2016 budget for expenditures reduced by payroll expenses is about \$562,000, and Food Services' annual budget is a little over \$2 million. While the final oversight for the Student Involvement and Leadership budget lies with the Union Director, it is also completely separate from the Union Budget. SIL is not an Auxiliary for the University like the Union is; thus, their budgets are separate and are both managed by the Union Director and the Union Finance Manager.

Beyond fiscal and personnel resources are a wide range of technology-based services, including wireless service throughout the building, sensory traffic counters, an inventory of audio and visual equipment, kitchen equipment, small wares, and furniture.

Shepherd Union Expenditures (-) Payroll

Actual 2016 - \$1.3 million

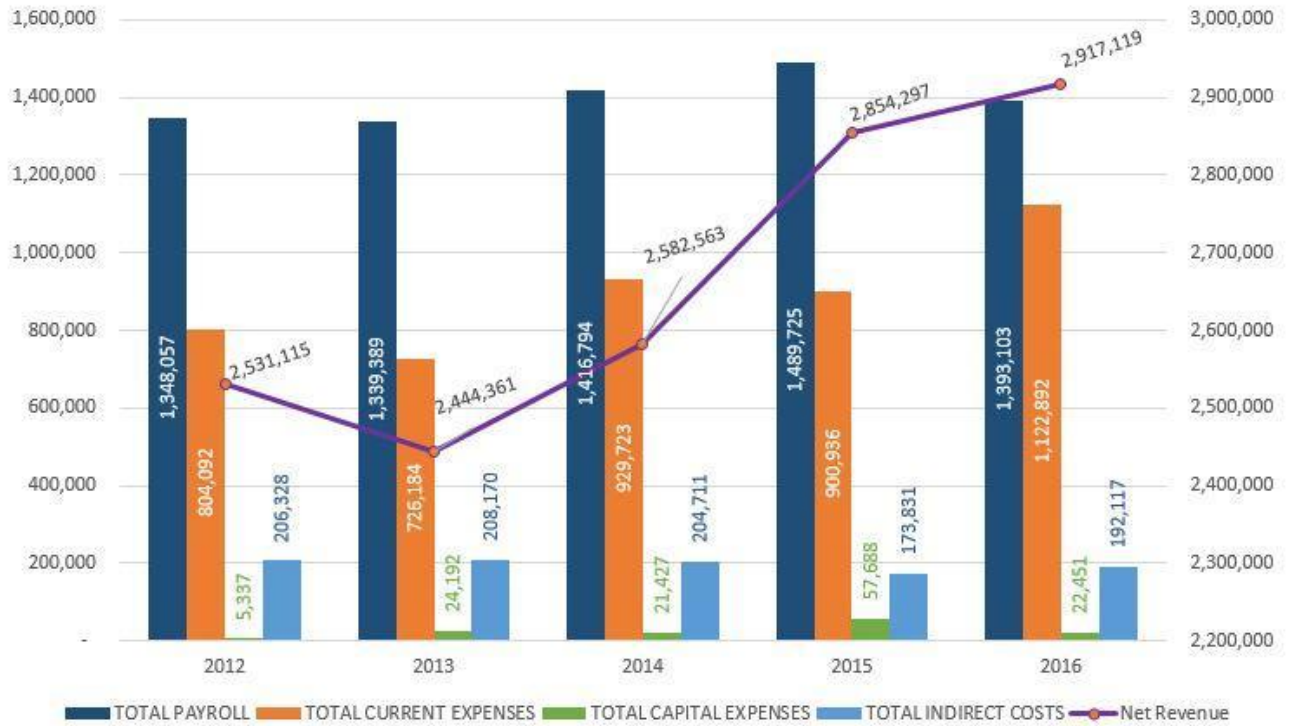
Budget 2017 = \$1.6 million

SIL Current Expenditures (-) Payroll

Actual 2016 = \$562,000

Budget 2017 = \$467,000

Overall Union Financials Summary 2012-2016

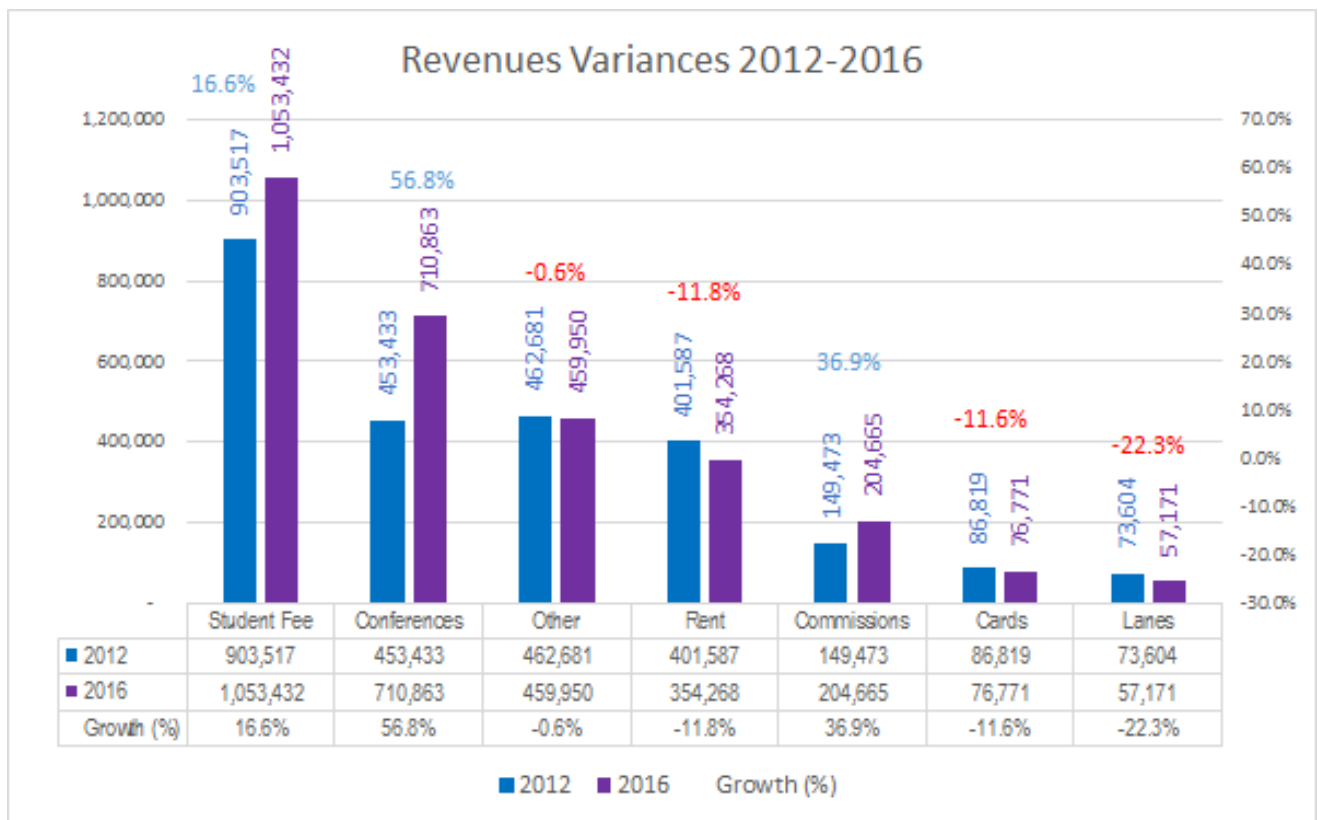


As discussed above, the Shepherd Union overall annual operating budget in 2016 was slightly over \$2.9 million, with an additional \$225k in reserves in a “plant fund,” which is used for smaller cost capital items relating to the building. The term “plant fund” has been used to differentiate the funds from the Capital R & R funds designated by the Vice President for Administrative Services for use by auxiliaries such as the union. The union receives approximately \$250k from the university for additional capital projects through the “Capital R&R” budget. See appendix F and G.

The Shepherd Union revenue is driven primarily from usage of facilities and services (see appendix G). The average (2012-2016) annual operating budget for the total union is shown below.

Operating Budget Total Shepherd Union

Revenues Union	2012	2013	2014	2015	2016	Average	Distribution Avg	Distribution 2016	Growth (%)	Growth (\$)
Student Fee	903,517	915,820	937,291	1,035,172	1,053,432	969,046	36.3%	36.1%	16.6%	149,915
Conferences	453,433	338,157	475,728	650,386	710,863	525,713	19.7%	24.4%	56.8%	257,430
Other	462,681	463,095	466,783	489,182	459,950	468,338	17.6%	15.8%	-0.6%	(2,731)
Rent	401,587	359,075	376,284	382,412	354,268	374,725	14.1%	12.1%	-11.8%	(47,319)
Commissions	149,473	207,404	171,431	162,055	204,665	179,006	6.7%	7.0%	36.9%	55,191
Cards	86,819	91,165	92,595	75,085	76,771	84,487	3.2%	2.6%	-11.6%	(10,048)
Lanes	73,604	69,646	62,451	60,005	57,171	64,575	2.4%	2.0%	-22.3%	(16,433)
Total Revenue	2,531,115	2,444,361	2,582,563	2,854,297	2,917,119	2,665,891	100.0%	100.0%	15.3%	386,005



Even though each of the 12 union “cost center” budgets are managed by individual department heads, all funds are rolled into the union’s balance sheet and fund balance. At the end of the fiscal year, an “Auxiliary Report” is prepared for the Weber State Board of Trustees, which shows the financial performance, quality of services and management status for the past year. To date, the Shepherd Union has been able to weather the challenging economic years without material negative changes in the fund balance.

Union Operating

The Union Operating area had an average of about \$1.7 million over the past five years. This revenue is composed mainly by student fees (57%), internal charges (23%), and rents (17%). From 2012 to 2016 the revenues grew about 12%. Payroll increased about 5%, while other expenditures had no significant variations over the past five years. (See appendix H).

Wildcard Services and Information Center

The budget for this area is primarily derived from sales of Wildcards (45.6%) and the fee that is charged each student at registration (\$2 per student per semester), which represents 49.5% of the net revenue. Wildcard's yearly average student fee for the last five years is about \$91,000. The remainder of revenue is from sales for event tickets and replacement of UTA (Utah Transit Authority) bus passes.

Personnel costs make up 36.4% of the expenses with the other large expense item being software maintenance contracts fees, which are 46% of total expenses. In the average, these contracts have a cost of about \$130,000 a year. (See appendix H).

Scheduling, Events, and Conferences

Overall net revenues for the Union grew by 15% over the past five years, driven mainly by conference revenue which increased by 57% in the same period. Revenue for the SEC is from two primary sources. The first revenue source is summer conferences. The second revenue source is through rental of the facility to the university and the general public. SEC does not use any agency or E&G (Educational and General) funds. Most expenses are straightforward costs to run the department. Fluctuations reflect the amount of business generated and respective changes in food and housing costs. See appendix I.

The ultimate goal is to maintain a department that breaks even. With the following graduated changes outlined on a yearly basis, the SEC is on target to reach this goal

- 2016 – Revised pricing plan and enforced rates for all customers
- 2017 – Implemented an increase in the SEC admin fee on all conferences.
- 2017 - Assess and develop a comprehensive marketing plan to attract and maximize facility usage which will ultimately increase revenue.
- 2018 - Implement the comprehensive marketing plan

Wildcat Lanes/Union Recreation

Wildcat Lanes/Union Recreation performed a yearly average of \$114,000 over the past five years; however, the revenues decreased by 17.5% in 2016 compared with 2015. This decrease in revenues is due to the reduction in the external demand. We are still using the lanes in our academic programs but the general public (outside the University) is not being attracted as used to be throughout the past few years.

The payroll decreased by 38%, and other expenditures decreased by 44% at the same period. (See appendix J Wildcat Lanes/Union Recreation)

Union Custodial and Event Setup & Maintenance

These two departments support the day-to-day operations of the Shepherd Union and do not generate revenue. The budget provides a clear and accurate picture of payroll costs and expenses for supplies and equipment. The departments are an essential part of the union and support increases in event bookings, and daily use of students, faculty, staff, and guests. See appendix K custodial and maintenance.

FACILITIES, EQUIPMENT AND TECHNOLOGY

When the Shepherd Union was renovated, a considerable amount of time was spent on the location of the union administration offices. It was decided to locate the offices on the fourth floor of the east side of the building. The offices are easily accessible but not highly visible.

The union is ADA accessible by way of ramps, elevators, signage, and a lift on the fourth floor. A Stryker Evacuation Chair has been added to the fourth floor in the event an evacuation is necessary. The union staff strives to keep the atrium floors clear in the “middle” and to keep vendors and signage on the “gray tile.” This is the norm for two reasons: to help sight-challenged students navigate the space, and to keep the atrium space open for pedestrian traffic. There are two handicap accessible ramps in the atrium to accommodate the elevation changes between the east and west sides of the building.

The space for the union building managers is located in the office behind the Information Center. When the union design was being finalized, this area reported to the associate director. The building managers have been moved and now report to the SEC office, making their integration with room setups and work with the custodial and set-up crew more seamless.

The SEC office currently utilizes Event Management Systems (EMS) software to schedule and manage all the meeting rooms and event spaces. Planning and managing meetings and events requires a lot of coordination between many parties. EMS helps us manage rooms, resources, services, people, and everything in between using one system — allowing us to easily execute flawless events while saving time and money.

All computers and equipment used for events are upgraded as needed and as budgets allow (See appendix K). The union custodial staff has an inventory of all audio/visual equipment and furniture. The building managers and custodians check the inventories each day to make sure all equipment is secure. The computers all have “Deep Freeze” software added, so that once a machine is turned off software and individual programs from the previous user are erased, and the computer is ready for the next user.

The union has a safe environment with the addition of 96 security cameras in the building. Thirty of the cameras are specifically for use in the Bookstore, with the remaining 66

distributed throughout the building. Access to the servers and software for these cameras has been given to applicable department managers.

Union facilities are also subject to annual safety inspections, which are conducted by the campus Fire Marshal's office. A report is sent to the applicable staff, and corrections or modifications are made as necessary.

Upgrades in overall building audio/visual equipment is a collaborative effort with a discussion in staff meetings and one-on-one with department heads to prioritize needs and make sure adequate funding is in place. Work is currently being done to produce a five-year capital plan that will specifically address union audio/visual equipment. The current roadblock in the plan is available funding to keep up with quickly changing technology.

Entrance to the union's exterior doors is controlled by the university's OnGuard electronic card system, which is programmed on the WSU Wildcard. The designated Area Access Manager (AAM), who is currently the director, gives access to approved staff and students to one of the six card-controlled access points. The exterior doors for the union can be automatically opened and closed, via programming, through an online portal. The union building managers also have the capability to control the doors through their Wildcards. This is used primarily during special functions, when the union is open on holidays, etc. Access is given by the AAM only after an e-mail is received, designating who has the access to specific doors. Currently, after-hours access through the east doors is granted to students and staff of *The Signpost* (student newspaper) and KWCR (student radio station).

The distribution of interior door keys (see appendix L) is handled by the union administrative associate. Forms are filled out and signed by the department head and the Union Director before a key request is sent to Student Affairs Maintenance. A key deposit must also be paid to the Cashier's Office before the request is approved.

In December 2016, an electronic/computerized key box will be installed. The union staff will utilize the electronic key card system to gain access to the building using their Wildcards to swipe into the building. Once in, the staff will then check out the set of keys they will need for their shifts. The benefit to this is the keys are more secure, fewer keys will need to be made and issued, because multiple people will check out the same set of keys on different shifts/days. Additionally, the system will also track who checks out keys and what time they are checked out. If a key set is not returned, it will send alerts and/or email.

Weber State University utilizes Blackboard Transact as part of its campus card and commerce solution. Blackboard is used to deliver point-of-sale applications and hardware for Dining Services, Wildcat Cash payment integration with Campus Stores, Pharos print management payment tender for WSU Student Computer Labs, and Wildcat Cash payment solutions for Printing Services and the Counseling & Psychological Services Center. Part of that delivery includes managing and processing meal plans, flex accounts and declining balance accounts.

Blackboard Transact provides an online eAccount interface for cardholders to view transactions and account balances. Cardholders can also add funds to their Wildcat Cash account through the interface.

The Blackboard Transact administrative console provides measured access, management, and monitoring for all aspects of the application. The reporting system can deliver scheduled or on demand financial, inventory, user, and assessment reports.

The Blackboard Transact Event Suite is used at entrances to the Swenson/Stromberg Gym Complex and Wildcat Center to authorize access, verify students, and activate turnstiles.

Wildcard Services and Information Center

The current facilities and office spaces are very effective for issuing Wildcards and handling large groups of people (e.g., first two weeks of semesters and orientations). The location of the business office provides security for handling money and reconciling accounts.

Due to the nature and services offered by the Wildcards, technology for this area is always changing and becomes obsolete very quickly. The computers and card printers used to produce the Wildcards are used very heavily due to the office hours and demands of student needs. Having a budgeted replacement schedule is very important in keeping current with technology and customer needs.

Some enhancements in technology we can make in order to provide a better experience and more value to students are:

1. The addition of Blackboard Building Blocks and ID Works would alleviate errors and lag created by manual data uploads from Banner and the ID Management Software.
2. Enabling NFC-compatible credentials on mobile devices and Biometric access points would give students an option to always carrying a card.
3. Mobile applications could be used by students to perform self-service tasks like updating their photos and managing their accounts. Partnering with financial services to create a “one-card” environment could expand card usage on and off campus.

There are two primary software systems used to produce the Wildcard:

- Vision Database Systems - Photo ID development software, ID card printing and database. Rapid Status is the software with the ability to permit or deny access to certain areas, based on specific criteria.
- Blackboard Transact - Blackboard Transaction software allows the Wildcard to be used for cashless transactions.

Wildcat Lanes and Union Recreation

WCL/Union Recreation is located on the second level of the Union, in the northeast corner of the building. It is adjacent to the atrium and the main north/south walking corridor through the building. In the bowling area, there are eight (8) regulation ten-pin lanes with Brunswick A-2 pinsetters. The pinsetters were installed in 1985. They were the last model A-2 pinsetters commercially installed by Brunswick. The lanes currently average about one stop per 300 frames. The lanes are equipped with dual deck light units allowing for both a white and black light fluorescent tube. The center lighting was redone as part of the 2006 renovation, as well as laser/party lighting over the lanes.

The original wooden lanes were installed in 1961 and were resurfaced every two to three years. In 1990, a guardian overlay was applied. The lanes remain today as the foundation for the Brunswick Pro-Anvilane that was installed in 2008. As a side note, the local lane inspectors from USBA have observed that the lanes are the most level in the Ogden area. The approach portion of the lanes has the university wildcat logo permanently added to enhance the collegial atmosphere. Each lane has a set of AMP automated bumpers linked to the Steltronic Automatic Scoring System. The masking units are an AMF model allowing for easy panel replacement/rotation for different visual effects, and all of the lane capping is also an AMF screw down style. The lane maintenance machine, a Phoenix-S model is now ten years old. The machine is relatively good for cleaning and conditioning the lanes. The cost for a replacement machine is about \$22,000. Currently, some maintenance issues are occurring with this machine, and a request for a new one will be submitted as the funds become available. The seating area for customers is being supplemented with chairs from the union's Lair. This could be better served with replacements of eight additional bistro stools that would match the six already in use.

In the billiard room has a total of eight (8) billiard tables: eight oversize eight-foot tables and one (1) nine-foot tournament table. The nine-foot table was purchased in 2010. Four of the oversize eight-foot tables were purchased in the 1990's, and the remaining four tables are part of the original purchases in 1961. The staff of WCL/Union Recreation performs all of the maintenance and re-felting of the tables. The four oldest pool tables are becoming more difficult to maintain as the past 50 years have taken their toll.

The customer service counter is equipped with a single cash register for all transactions. The area is located in the billiards room, adjacent to the lobby and bowling lanes. A window is located in the wall between the counter and the lanes, which allows direct visual oversight of the bowling area at all times. The location also allows unobstructed visual oversight of the billiard room. All of the lane scoring systems are controlled here, as well as the sound system.

Wildcat Lanes/Union Recreation has its own air handling, heat and air conditioning system. This is located in the mechanical room to the north of the billiards area. Although this gives the area a somewhat individualized system, control is maintained by the campus heating plant. The open construction of the building allows for communal airflow through the billiards room. Differing airflows in the billiards and bowling rooms leads to a sometimes

stale and hot situation in the bowling area. This is an issue we would like to resolve however we aren't likely to have the opportunity as it would be a huge financial investment in a space that doesn't bring in a lot of revenue.

The location of the billiard room, adjacent to the atrium, lends itself to great visual appeal and recognition; however, a barrier exists due to the elevation change and lack of direct access from the atrium level. The location of stairways in the building also makes it difficult for patrons to get to WCL from the third floor. Numerous complaints have been noted from students from the Student Involvement and Leadership offices and the Nontraditional Student Center about the access. The location of the lanes, up the stairs and down the hall from the atrium, hidden from the view of patrons, have left many students uncertain of the location of the lanes, or even unaware that we have lanes in the building.

Custodial and Event Setup

The custodial and event setup team works out of two different locations. The main location is located on the first floor by the storage and work areas. The secondary location is on the third floor by the ballrooms. This location was decided upon to facilitate staff closer to the main conferencing area. The office on the third floor is the most accessible for our customers. One of the biggest challenges for the department is storage. In the effort to keep updating equipment, we are often buying more equipment and finding storage space lacking. An updated inventory list is helping with this turnover; however, we still seem to be short on space.

The department strives to provide a safe environment. Exterior snow removal is done first thing in the morning, in conjunction with Facilities Management personnel, and the staff works hard to keep the floors free of excess water (on the tiled areas) to prevent any slippage hazards.

The union gets a "Union Building Safety Inspection" and a Fire Marshal report annually. The staff works very hard to correct deficiencies noted on the reports. We have painted a stripe on storage room walls to designate how far items can be stored to the ceilings, again, as noted in the building safety inspection.

New equipment was purchased to aid the department in the daily cleaning of the facility. A carpet extractor was purchased to increase custodial efficiency; a floor buffer was added to help with the tile in the atrium and common-area hallways. New equipment is added as funds become available.

As audio/visual equipment becomes obsolete, new equipment is added as budgets allow. The union staff is trying to keep our inventory of items on the "cutting edge" of technology because of the customer base we support. The staff worked with WSU Electronic Service and Repair Department and added exterior audio/visual wall ports to each meeting room. The department needs to be more efficient in discarding old, broken, and/or obsolete items. The storage areas need to be cleaned on a regular basis, and the older equipment needs to be

disposed of. The department has also submitted an “AV Wish List” that includes equipment the staff feels would help with events in the building. This list is discussed with the Associate Director periodically to see if funding is available and is changed as new technologies become available.

Student Affairs Maintenance

Student Affairs Maintenance has an area designated in the union for a shop. This area is mainly used for storage of repair parts and painting supplies, which are unique to the Union. The main office is located at the Facilities Management Building at 3700 Skyline Parkway. There is also a small area for storage at this same location. The main storage and repair facility is located in the basement of the Community Center in University Village at 1321 East 4600 South.

Scheduling, Events, and Conferencing

The current location of SEC is effective for the amount of employees with flexible space for the addition of one more person. The design of the office was to provide close proximity to the largest number of events in the building. This design has proven to be effective, as the department is very visible and accessible to clients. The space isn't large enough to accommodate the Associate Director, so that position was relocated to the fourth floor in the Union Administration offices. The SEC office suite now hosts the Money Management Center.

Moving forward, the staff would like to renovate the space to provide more privacy for the professional staff members. The current space has the Scheduling Coordinator and Conference Services and Outside Area Scheduling Liaison sharing a large space; and the only access to the Money Management center is through the common space the SEC staff share. The space also has a door that leads to the dining services office. While this has created collaboration with dining services, it is sometimes difficult for the SEC staff to be productive and to also provide customers with a quiet and private space for meetings.

SEC provides a safe environment and also serves as a command center for much of the building. The use of security cameras in the union provides a secure environment. SEC works closely with police, fire, and safety personnel to provide for appropriate preparation, planning and execution of events with safety a top priority.

SEC maintains a capital expense budget line and rotates computers approximately every three to four years. SEC utilizes the latest in software technology and strives to keep the meeting spaces up-to-date as well.

SEC is currently using EMS software to coordinate scheduling, work with venues across campus, and create a dynamic calendar to assist the campus in keeping up-to-date. The EMS software also allows for customers to make online reservation requests. While this feature has been available for some time, the SEC office has not used this feature. SEC office team has spent the

past nine months working with IT to get the online reservation system ready for customer uses. Technology is also used in digital signage throughout the building.

ETHICAL AND LEGAL RESPONSIBILITIES

The department operates under the guidelines of university policy and procedures, guidance from Internal Audit and Accounting Services. The department also follows the code of ethics based on the ACUI guidelines, CAS Standards and good common sense. The department follows the Information Security Policy as outlined in WSU Policies and Procedures Manual 10-1 and 10-4.

The computers used for events are password protected and have “Deep Freeze” software installed to eliminate stored information each time the computers are turned off. The union set-up staff and union building managers have the passwords to help patrons with events. The computers are locked and stored in computer carts each evening and are either locked in individual meeting rooms or in the central audio/visual closet.

The Financial Manager acts as the “gatekeeper” of financial responsibility for the department. The good working relationships with Accounting Services personnel and Internal Audit have helped identify problems before they have become major issues. Trends are brought to the attention of the department heads, and mistakes on financial information is corrected quickly.

Wildcard Services and Information Center

This area has the primary management responsibility relating to the Wildcard for security credentials, maintaining the following compliances:

- Payment Card Industry Payment Application Data Security Standards (PCI PA-DSS) compliance laws
- Federal Cash Management Rules
- Graham Leach Bliley Act
- Family Educational Rights and Privacy Act (FERPA)
- Federal Trade Commission (FTC) rules on safeguarding personal information
- Federal Deposit Insurance Corporation (FDIC)
- The Patriot Act
- Regulation E (Banking)
- MasterCard carding regulations

The department follows policies and guidelines as outlined in WSU Policies and Procedures Manual 10-1 and 10-4. At the Information Center, the staff do not have access to sensitive student/staff information, credit card information is not taken over the phone, and all software is now PCI compliant. The students/hourly staff sign a computer use waiver but not all staff have administrative rights for certain software.

All financial records are kept in locked file cabinets in the Union Business Office. After being kept for the requisite four years, all financial records are shredded.

Wildcat Lanes/Union Recreation

As a retail operation, Wildcat Lane uses a cash register change fund, maintains a change machine, and utilizes a vending machine for merchandise sales (removed in 2016) which means there needs to be considerable financial oversight and control in this area. Reduction in staff has led to the need for video surveillance to ensure employee accountability in this area, since only one employee controls the funds at any time. Operations are checked daily by a separate employee who balances the deposits and checks the spare change fund. Control of the change machine is strictly limited, with only the Manager having key access. Most employees have the combination to the safe for opening operations at the beginning of the work day. In addition, WCL/Union Recreation has the responsibility to collect and pay sales taxes on applicable sales. WCL/Union Recreation is working with campus representatives to insure that credit card machines are in compliance (PCI) to protect users from identity theft. WCL/Union Recreation staff have no access to sensitive computer information for students. Adjunct faculty for bowling and billiard classes have access and must be trained in regard to their responsibility to protect sensitive information. Some of the training is done by the PE department secretary when assigning them computer access and is supplemented by the WCL/Union Recreation Manager as well.

Activities such as bowling and billiards carry some inherent physical risk. To help document any incidents, video cameras monitor the area closely. There are 13 cameras in use in the facility, all with a 90-day recording capability via a DVR system. One camera monitors the workshop and pinsetters for mechanical safety. Wildcat Lanes/Union Recreation has clearly posted rules of behavior for participants.

Signs are also posted in the bowling area that alert customers of the danger of crossing the foul lines. In addition, signs alerting customers to their assumption of risk to their bowling balls in case of machine or lane damage are posted. There remains a slip/stick/fall risk for patrons who are bowling, and this is magnified any time there is bad weather that could result in water on the floor, or from wet floors from the nearby restrooms.

The open structure of the union has been a concern, but, surprisingly, there have been few abuses of the facility. There have been some theft issues and some vandalism; however, the video surveillance system and late shift staff checking facilities have helped mitigate these issues. Campus police are also available at any time to take calls for issues that are of concern to employees or patrons. The police have also sent officers to help with the closing of the building when there have been concerns.

Scheduling, Events, and Conferences

SEC abides by the WSU Policies and Procedures as currently listed. Policies of special note are Facility Usage, Conferences, and Campus Calendar.

SEC office does not collect or maintain high-risk, restricted, or confidential information. Items such as credit card transactions are handled through the University Marketplace system.

ASSESSMENT AND EVALUATION

The Shepherd Union utilizes a wide range of planning and assessment processes that are addressed in the self-study. Overall, the union goals are developed in concert with the Division of Student Affairs and WSU's overall process. While not everyone in the Shepherd Union can see themselves directly reflected in specific university goals, the union involves all staff members in the process of creating the union six-column model (our goal setting template) and strategic plan. It is important that all those on the union staff see themselves as essential components of union programs and are key in developing and maintaining a quality and stimulating environment and providing the amenities of daily life on a university campus. With this in mind, departments create their own goals, action steps, and measurable outcomes, which are reviewed by the Union Director and the Division of Student Affairs. In 2016 the union team worked as a whole to create our six-column model. This is the first time the entire team has come together to contribute to the plan and create the model. Every full-time staff member is assigned to one of the goals, and at each all staff meeting in the fall the goals are reviewed.

Union Strategic Plan

In the spring of 2016, the Shepherd Union administration created a strategic planning committee to keep the Shepherd Union current, to measure the outcomes of day-to-day decisions and to provide long term direction.. This committee, which has representation from all departments of the union, focuses on creating goals that align with Student Affairs initiatives, determining actions and identifying resources to accomplish these goals.

The next step was to organize focus groups, which collect perceptions, opinions, and expectations from the union cohorts. These focus groups included the following campus committees:

- Union employees
- Students
- Faculty and staff
- Union building tenants

The SWOT method was used to gather information in these focus groups. This method helped to identify both internal and external factors and helped foster strategic thinking.

- Strengths – what are we doing right, what is working with the current processes
- Weakness – what are we doing wrong, what is not working with the current processes
- Opportunities – what are the opportunities, both currently and in the future
- Threats – what are the current and future threats

Through this process, six objectives were developed, along with strategies on how to best execute successful outcomes, time frames, and accessible ways to measure the progress and results. The updated strategic plan is included in appendix B.

Assessment is a routine part of all union programs and services, beginning with counting the usage of union facilities and interactions with a range of programs. Evaluations also assess customer/student satisfaction, fiscal performance, and student learning. In the following study numerous assessment processes are detailed and reviewed in order to accurately illustrate the daily functions of the Shepherd Union as well as the accomplishments, contributions, and advancements it has brought to Weber State. The union participates in the ACUI EBI survey almost yearly. The survey measures satisfaction and outcomes in the four main pillars of the union: operations, student involvement, dining services, and retail operations. The most recent results are from 2015 (See appendix C). The union team has discussed having a renewed focus on assessment as past leadership did not excel in this area; the union has limited resources to evaluate its service and performance.

The assessment section as a whole is not entirely applicable to these areas. The financial and operations areas are more service oriented. The students who come to work for us begin “just looking for a paycheck.” Most leave with skills that are transferrable to their post-college employment (i.e., customer service skills, conflict resolution, written communication skills, etc.). Some students have found that working as a Union Building Manager gives them leadership and communication skills. This can also be said about most of the students who work in our areas. Assessment and outcomes have not been a priority over the past few years, but with new leadership the focus has shifted. Not only is the Union team working on Student Learning Outcomes for the student employment program, but each area is being asked to make significant strides in creating a tradition of assessment.

The Shepherd Union has a system to count the number of patrons in the building on any given day through the use of electronic “people counters.” This system was installed after the Union’s renovation and uses a combination of thermal counting and “beam” counters. This software has provided good data on the increased usage of the Union. Although this system is generally reliable it hasn’t been tracked over the years. In preparing for the report we attempted to pull the data only to find out that over the past 5 years this system has been neglected and as a result there are giant gaps in time where no data was being collected. We have since worked to repair the issues and are now checking on the system regularly.

The EMS scheduling software also provides more accurate information on the number of events scheduled, how much equipment is requested, and how many people attend the events. (See appendix M)

Various survey instruments are used to measure students’ satisfaction with union services and facilities. The EBI (Educational Benchmarking Inc.) surveys have been used with more frequency than other surveys. The union staff has used EBI since 2003, using the on-line and the hard-copy surveys versions. The results of the surveys vary greatly pre- and post-renovation for the union. The union will use EBI again in the spring of 2016. The most current EBI data is available in appendix C.

Based on the EBI Survey results, we can focus our efforts on areas most in need of attention while some of them need to be monitored only. For instance, 78% of our students believe the

Union provides a variety of services. This compares to 80% at all other institutions administering the same survey. Another relevant result realizes that whereas 73% of students from all other institutions are very satisfied with the Union Overall, 65% of Weber's students are satisfied with our Union. Other result that deserves our attention is related to the adherence of our Union's programs with student's interests. On this matter, 62% of our students are satisfied or moderately satisfied. This compares to 70% at all other institutions administering this survey.

The union staff has also tried, on occasion, to use the ACUI Benchmarking Survey. This survey is very detailed and lengthy. The information was found to be very difficult to extrapolate for our specific needs, as many of the institutions that participate are not comparable to Weber State.

Goals and initiatives for the union staff are determined at annual staff retreats. The entire union staff participate in the six-column model that is prepared each fall. Each department has an individual set of goals on the six-column model, but the document is submitted as a total department. The most recent six-column model is included here in appendix N. Other years can be found at: http://www.weber.edu/SAAssessment/SSA_Dept_Assessments.html

Wildcard Services and Information Center

The Information desk student employees have a set of learning outcomes related to on the job training as well as personal development that help in guiding their training.

Student Learning Outcomes: Students will learn effective customer-service skills.

- On-the-job training
- Staff development training in areas such as phone skills, listening and diversity

Students will learn critical thinking skills and competencies required in the work force.

- Answering questions at the Information Center
- Finding current information for campus events and programs
- How to use campus resources
- Training in campus policies and procedures

Students will learn communication skills.

- Listening to customers' needs
- Giving correct information in a helpful and courteous manner

Students will learn technical skills.

- Training on the software used to verify eligibility, produce Wildcards, financial transactions, ticket sales
- On-the-job training
- Card printer maintenance (i.e. cleaning, changing ribbons, checking data imports)

Methods used to examine the student learning outcomes include customer service surveys, pre- and post-employment tests, supervisor evaluations and secret shoppers. Due to staff turnover and a lack of focus on assessment we can't say whether or not these have been effective as they haven't been regularly measured. This is something we plan to work on moving forward.

The totals for all new Wildcards sold including the Orientations and the students that were not part of an Orientation. This does not include replacement cards so it looks at those who received their cards for the first time. The price of a new Wildcard is \$10.

From April 1, 2015 to August 31, 2015 the total dollar amount in sales of new Wildcards was \$21,360.00 which is a total of 2,136 new students. From April 1, 2016 to August 31, 2016 the university started implementing mandatory orientation. In that time the total dollar amount in sales of new Wildcards was \$26,200.00 which is a total of 2,620 new students. This is an increase of \$4,840.00 and (484 students).

Wildcat Lanes/Union Recreation

WCL/Union Recreation is an auxiliary operation which is much like a small business. The success of the operation is assessed by comparing financial performance and facility usage, year to year. Annual comparisons are calculated for revenues, the number of bowling games, billiard hours, hours of reservation use, video game plays, bowling and billiards class students, etc.. In addition, some special groups of cohort students are traced as to their academic retention and graduation (WCL/Union Recreation student employees and bowling club members).

The classes undergo an end-of-semester evaluation, from the students, of their instructors and our facility. A written tracking system for pinsetter problems has also been implemented.

Although an attempt has been made to track community versus student or campus usage, the system is flawed and relies on the accuracy of student cashiers in assigning correct customers to the correct categories. It would be helpful to know which specific customer populations are being served (i.e., on-campus residential students, community high school students, nontraditional students, etc.) and obtaining this information is something we plan to do in the future.

Due to a major change in staffing, assessment hasn't been a top priority for the lanes. As soon as the position is filled, Wildcat Lanes/Union Recreation will begin a renewed focus on assessment.

Student Affairs Maintenance

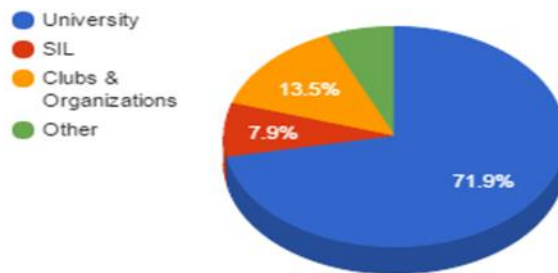
Maintenance keeps track of the number of work orders that are placed and completed. In 2015, the total combined work orders completed was 3,783; 578 of those were for the Shepherd Union. The time it takes to complete these work orders is also tracked. The average response time is one day for normal repairs or calls. Health and safety issues are handled immediately, and if outside assistance is required, the needed service is immediately contacted.

Scheduling, Events, and Conferences

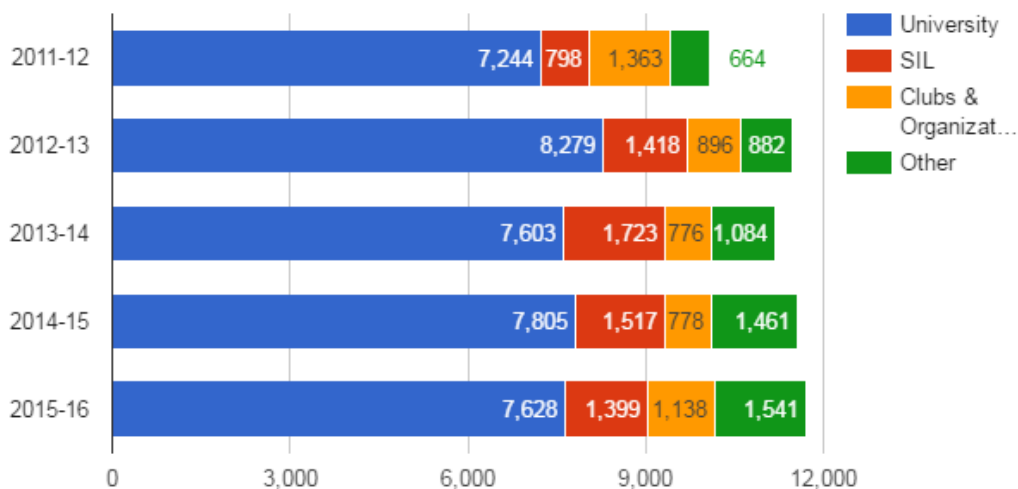
The SEC office currently utilizes Event Management Systems (EMS) software to schedule and manage all the meeting rooms and event spaces. EMS helps us manage rooms, resources, services, people, and everything in between using one system. EMS generates utilization reports to help analyze facility usage that assists with employee scheduling, event set-up and take down, and hours of operation. SEC also assesses Summer Conference usage by using a multi-year Google Document.

The union has averaged 11,200 bookings a year in the last five years, mostly for University's events. See Appendix D group stats 2010-2015. Booking for SIL has grown by 75%, while the university's event bookings have grown by 5.3% over the past five years. The union struggles with creating a balance between being available for students and student events while also attempting to build off campus relationships that produce revenue. The students often see the union as a conference center. SEC has worked hard to create policies that keep outside groups, or even faculty and staff, from booking events too far in the future because it often takes away from the availability for students to use the space.

Booking Analysis 12-16 - By Group



Booking Per Group 2012-2016



DISSEMINATION

Outcomes are reported to Student Affairs Assessment Office on an annual basis in the 6 column model. We plan to share the results of things that are changed based on focus groups and surveys like the EBI even though in the past this hasn't been a regular practice.

SUMMARY

In the last five years the Shepherd Union has undergone a massive change in some ways, and in other ways we continue to move forward doing some of the same things that the college union has been doing for years. The Union Administration Team has had massive turnover in administration in the past two years, structures have been realigned, furniture is aging, and social media is taking off. The changes in staffing have been challenging, and have led to neglecting important areas of union work, like assessment. While staff was turning over and positions were vacant, the union team was lacking leadership and lost sight of important areas of work. There has been a renewed focus on these areas as the entire department worked together to create a new three-year strategic plan and the six-column model.

Due to the departure of certain staff members, realignment was necessary. Previous positions had responsibilities that aligned with personal interest or skills. The changes that were made are detailed below:

- Building Managers were moved under Scheduling Events and Conferences to better support customers and the Building Managers' integration with the scheduling and event staff.
- Wildcat Lanes/Union Recreation was moved under Student Involvement and Leadership to better integrate student programming into this space and to provide programming support for the Manager.
- Scheduling Events and Conferences (SEC) saw a reorganization of duties to more clearly define the work of each person in the office and create more attainable goals.
- Custodial, Maintenance, and SEC were moved under the Associate Director of Operations.
- The Union Art Gallery was moved to Student Involvement and Leadership.
- The "Bridge" program was moved to SEC for scheduling and promotion.
- Over the past five years, social media has taken off, and the union has been left behind. Without a social media and marketing person, the union hasn't been able to tap into the potential for advertising and promoting union services and spaces through social media. In order to remain relevant and at the front of the students' minds, the union will need to find ways to get more involved in social media and have an increased presence.

Strengths and Accomplishments

This self-study has highlighted many areas of strength for the union. Without good staff, the union would not be the space it is. While our maintenance team is often being pulled in two different directions (due to their shared responsibilities with housing), they do a fantastic job of

keeping our facility safe and updated. Our maintenance team is able to be responsive to our needs, and because they report to the union, the communication between maintenance and the tenants of the building is smooth. Moving maintenance under the Associate Director of Operations has strengthened the ties between custodial and maintenance which will continue to make overall building operations and communications easier.

Despite the staff turnover in Scheduling Events and Conferences (SEC), this team has continued to work hard to bring in new clients as well as maintain positive relationships with existing customers. The union continues to host some of the most important events on campus and has worked hard at building a solid summer conference program. Their continued work with housing and residence life has led to a very successful and profitable summer conference program. At times it is a struggle to balance potential revenue streams with the priorities of our campus community, but SEC has struck a nice balance. It will be key for SEC to develop more marketing strategies and updated conference materials to continue to recruit new business. They will continue to forge positive relationships with mainstay conferences like Boys and Girls State. These have been keystones for a successful summer conference program.

Union Finance has also been an area of strength in the past and that will continue to get better with time. The hiring of new Finance Manager Daniel Godoy has proven to be a good move, and the Union should see many changes and positive revenue flow with his assistance. Throughout the years, the union's finances have been tightly managed, and the relationships with other campus entities have been positive. Even in rough times, the union has found ways to flourish.

While the current equipment is adequate, additional technology and equipment desired includes layout software, dynamic digital signage software, newer LCD screens in meeting rooms, faster laptops in meeting rooms, and digital screens for "virtual banners" in the atrium. In some conference rooms, the size of the LED screens isn't sufficient for presentation use. Moving forward, those screens will need to be replaced with either larger LED screens or, potentially, projectors to ensure the facility's ability to meet the customer's needs.

Areas for Improvement

- More consistent assessment is a priority, moving forward. Many of the departments within the union structure are contributing positively to the overall student experience but have failed to provide documentation and proof that they are making a difference. A renewed focus on assessment will be necessary. The union needs to focus, also, on providing more data to support their impact on the undergraduate student experience. In order for the union team to be more successful in assessment, there will need to be a focus from union leadership and accountability on a yearly basis to ensure success.
- Securing increased funding, long-term. As the union building ages, the carpet, furniture, AV equipment will all need to be replaced. Currently, there is no five-year capital plan for the union, and the union has little in the way of reserve. A lot of the movable furniture, fixtures, and equipment will need to be replaced in the coming years. From lounge furniture to large kitchen equipment, the union will need to develop a plan for

replacement, secure any additional funding needed to do so. Given the current budget, the union will not be able to replace and update all items necessary. In order to meet the ever-changing demands of the student population, as well as remain a viable place for conferences and events, the union will need to stay up to date on furniture, lighting, AV equipment, art etc. See appendix Q.

- Promotion of union facilities and programs is in need of support. The union department and other entities within the union, offer some phenomenal programs and services, but the union doesn't currently have the staffing to focus on marketing, social media, and promotion. Wildcat Lanes/Union Recreation would benefit greatly from having a clear marketing campaign and updated promotional materials. The Wildcard program continues to break even almost yearly but could also benefit from some solid marketing about the services they offer. The union needs to have a more unified look, logo, and tagline, but, under our current structure, each department is left to take care of their own needs, and it doesn't bring together the services the union offers or create a consistent model for promoting of the union.

GOALS

- Increase marketing and promotion of all union services through a solid three-year marketing plan.
- Continue to develop a solid student employment model for all union employees and increase job-specific training.
- Develop five-year capital plan for replacement of FF&E (for current plan see Appendix O).
- Reorganize custodial staff and schedules to increase efficiency and productivity.
- Explore new ideas for the use of the Lair and the Wildcat room.
- Develop and enact an art plan for the building.
- Continue to work toward making assessment a department-wide priority.
- Work with all departments to make sure that documents are being created digitally and uploaded to shared places for future reference.
- Promote the use of union facilities to the Ogden community.
- Increase use of Wildcat Lanes by the student population.
- Resolve any outstanding issues with the people counting system.

The union has built a solid foundation of programs and services over the years. The building is well-positioned on campus and will continue to be competitive in the Ogden area for both services and conferences. With a full staff, the Shepherd Union is poised to make great strides in marketing, assessment, and overall planning.

Union Board

The Union Board is a committee of staff, faculty, and students who discuss topics of potential Union programs, problems that have arisen, and other issues. The following members are:

Jan Winniford	Vice President of Student Affairs
Norm Tarbox	Vice President of Administrative Services
Molly Ward	Director of Shepherd Union
Jessica Alford	General Manager of Sodexo
Dane Le Blanc	Weber State University Chief of Police
Tara Paris	Director of Student Involvement and Leadership
Kristie Godfrey	Associate Director of Operations
Melissa Stuart	Program Coordinator of Alumni
Hailame Kinikini	Union Board Chair and Vice President for Diversity & Unity
Larissa Jiron	Senator of Residence Halls Students
Slim Ben-Khalifa	Senator of Traditional Students
Patty Gomez	Recorder of the Union Board

Bylaws of the Weber State Union Advisory Board

Article I

Purpose

Section I The purpose of the Union Advisory Board (UAB) shall be:

- A. To serve a resource to the Union Director and provide advice based on the best interests to the Shepherd Union.
- B. UAB:
 1. To review any changes to fees, charges, rates, or other price related changes that occurs within the Shepherd Union Building.
 2. To ensure any renovations or installations are in the best interest of the students and Weber State University.
 3. To approve or deny any requests for reservations in the Shepherd Union Building that is more than a year in advance.
 4. To review and advice on issues regarding reservation and risk management policy.
 5. To provide and oversee a form for the University community to share concerns and suggestions pertaining the Shepherd Union Building.

Article II

Structure

Section I The Union Advisory Board (UAB) will consist of:

- A. Permanent Appointments:
 - The Weber State Union Director (Co-chair)
 - The Student Vice President of Diversity (Co-Chair)
 - Assistant Union Director
 - Weber State's Vice President for Administrative Services
 - The Weber State Student Leadership and Involvement Director
 - The General Manager of Sodexo
- B. Special appointments:
 - A tenant from the Shepherd Union Building
 - A Building Manager
 - An Alumni member
 - A member from Public Safety
 - A faculty member
 - A student or staff member from the Residence Hall
- C. Ex-Officio Members:
 - The Weber State Union Director
 - The Student Vice President of Diversity

- Assistant Union Director

Section II UAB attendance Policies and Procedures

A. Public Attendance

1. The Union Advisory Board meetings are open to the public, and can be attended by anyone.
2. Those who attend the UAB meetings and are not a member of the Union Advisory Board are not permitted to vote, and can speak during the time allotted to public attendees.

B. Member Attendance

1. If any member of the UAB is unable to attend a meeting, they shall send a representative from their constituent to take their place.

C. All voting will be done following Robert's Rules. No member of the UAB will abstain.

Article III

Membership Requirements

Section I All student members of the UAB Shall:

- Be in good standing with the University
- Maintain an overall Minimum GPA 2.25
- Take a minimum of 6 credits per semester
- Earn reasonable progress toward a degree
- Fulfill the duties of their position as outlined in the bylaws

Article IV

Constitutional Amendments

Section I Any member of the UAB may propose Amendments to this constitution. Proposals must be submitted in writing and be presented to the Co-Chairs of UAB to be added to the agenda.

Article V

Ratification

Section I This Constitution shall be ratified and/or nullified by a 2/3rds majority vote. Updated: January 20, 2016

OBJECTIVES	STRATEGY	INITIATIVES	ACADEMIC YEAR	MEASURES
<p>Through new programming and marketing efforts, Bowling and Billiards will be an engaging and revenue generating space that will continue to support student programming</p>	<p>Hire Programming Coordinator to manage and activate the space</p>	<p>Create outreach plan for possible customers. Create update signage including a flag mounted sign in the main hallway Create revenue plan (special Union Tenant rates, and special promotional packages). Create programming plan to include regular programming on certain nights of the week.</p>	<p>2016- 2016- 2017- 2016-</p>	<p>- increase in programs from 2015-2016 - measure students usage of the space over time as well as measuring student perceptions of space over time beginning with customer survey in early months - increase in revenue by 10% - increase in programs from 2015-2016</p>
<p>Offer a variety of personal and professional development learning opportunities for Shepherd Union student</p>	<p>Create a formal Shepherd Union student employee training</p>	<p>Implement formal trainings for job specific skills for each area in the union. Facilitate ongoing community building opportunities to increase student employee retention Implement when to work software Actively recruit underprepared and underrepresented student employees</p>	<p>2017- 2016- 2016- 2017-</p>	<p>measure student perception of how well the training they received prepared them for the job measure student employee retention per semester. retain 75% of employees from one academic year to the next. implementation of software Pretest students prior to workshops on their knowledge on the topic as well as their level of 10% of union student employees with be non-Caucasian</p>
<p>Enhance Shepherd Union sustainability efforts.</p>	<p>Partner with Dining Services to create a Gardening Committee who can administer a needs assessment Develop post-consumer compost plan and further educate students Develop a recycling model for the Union Building to increase the Complete the LED light replacement project (100% of lighting is changed Increase the availability and awareness of bike racks outside the</p>	<p>Research best practices and other models and innovations used at similar institutions. Create new, informative signage and purchase designated compost bins. Research recycling models at other institutions. purchase separate bags for recycling. Increase the number of recycling bins in the Union and make them more identifiable. Determine best places for bike rack(s) placement. Add more bike racks around the Union Building (if a need is determined). Advertise the availability of bike racks on campus and the benefits of biking as a form of transportation and fitness/well-being.</p>	<p>2016- 2016- 2017- 2017- 2016- 2017- 2017- 2017- 2017- 2017-</p>	<p>Measure student knowledge on post-consumer Measure number of recycling bags used throughout the year. Increase the number of recycling bins in the Union Change 100% of all retro-fitted fluorescent lights over to LED Add four new bike racks</p>

OBJECTIVES	STRATEGY	INITIATIVES	ACADEMIC YEAR	MEASURES
Review policies and use of space in the building to reflect the current needs of customers and students.	Review current policies and suggest changes or edits	Establish policy review committee	2016-2017	Establishment of committee
		Take major policy changes to Union Board	2016-2017	Completion
		Post the policies on the SU website	2017-2018	Completion
Educate University community on updated or additional policies		Select major policy changes or additions to market to University Community	2017-2018	Assess building needs through survey and completion
		Work with SA to have changes published in monthly newsletter/announcements	2017-2018	completion
		Supply all SU Tenants with a copy of the Operations Manual	2017-2018	completion
Assess the usage of the Meditation Room and Quiet Study Lounge.		Student surveys and comment box.	2016-2017	Track usage of space, building managers and W
Update and research new signage and way-finding opportunities.		Select and implement new way-finding method (technology).	2017-2018	Conduct study with an outside consultant to
Create a signage and outreach plan for the Wildcat Room.		Raise visibility of the physical space	2017-2018	Increased usage of the space based on Sodexo
		Create videos that highlight the features of the Wildcat Room (to be used on the Union televisions and on the internet, social media, etc.	2017-2018	completion
Determine best names for Sky Room and Senate Room.		Union Board will discuss the naming of the rooms throughout the Union and make a decision.	2017-2018	completion of name change as necessary
Create a branding and marketing plan to increase visits and revenue.	Increase revenue in conference services and Waldo's Corner Pocket	Increase marketing efforts in WCP	2016-2017	Establish base for revenue then determine incre
		Create Union Tour video to market to off campus customers	2017-2018	Track student participation in programming
		Update brochures related to space in the building for conference services	2017-2018	
		Select and purchase uniforms and staff shirt to create cohesive look	2016-2017	
Create and enact a 5 year capital plan to include renovation of space and updates throughout the union.	Secure funding to meet capital financial needs for Shepherd Union	Identify funding sources through university advancement	2016-2017	Achievement of funding
	Create a detailed plan of how to systematically update furniture, fixtures, & equipment	Assemble steering committee to identify update needs	2017-2018	completion of plan
	create av update plan	Prioritize identified update needs	2017-2018	
		Present proposed plans to Union Board and other stakeholders	2017-2018	Creation and completion of plan

Union EBI Survey Summary



WEBER STATE UNIVERSITY
Student Affairs

Spring 2015

The following items were extracted from the College Union Educational Benchmarking Inc. (EBI) Survey. The survey was during spring 2015. A total of 163 students responded for a 8% sample error at a 95% confidence interval. Select 6 institutions are those chosen by WSU as peer institutions. These institutions included: Colorado Mesa University, Colorado State University, Frostburg State University, Kent State University, Southern Illinois University Edwardsville, and University of Wyoming. **Union Atmosphere**

75% of students think the Union is an enjoyable place to spend time. This compares to 80% at Select 6 institutions and 79% at all other institutions that administered the survey.

83% of students feel that the Union is safe. This compares to 87% at Select 6 institutions and 86% at all other institutions that administered the survey.

79% of students are satisfied with the cleanliness of restrooms. This compares to 83% at Select 6 institutions and 80% at all other institutions that administered this survey.

75% of students think that the Union is student oriented. This compares to 80% at Select 6 institutions and 77% at all other institutions that administered this survey.

76% of students feel that the Union is a safe place where they feel welcome. This compares to 82% at Select 6 institutions and 82% at all other institutions that administered this survey.

80% of students feel that the Union is a central meeting place for students. This compares to 83% at Select 6 institutions and 81% at all other institutions that administered this survey.

59% believe the Union promotes a sense of community on campus. This compares to 72% at Select 6 institutions and 71% at all other institutions that administered this survey.

Programs, Services, and Staff

65% of students are moderately or very satisfied with the Union overall. This compares to 75% at Select 6 institutions and 73% at all other institutions that administered this survey.

62% are satisfied or moderately satisfied that the Union promotes programs of interest to students. This compares to 71% at Select 6 institutions and 70% at all other institutions that administered this survey.

78% believe the Union provides a variety of services. This compares to 82% at Select 6 institutions and 80% at all other institutions that administered this survey.

69% of students feel that the Union staff is available. This compares to 75% at Select 6 institutions and 73% at all other institutions that administered this survey.

Student Involvement

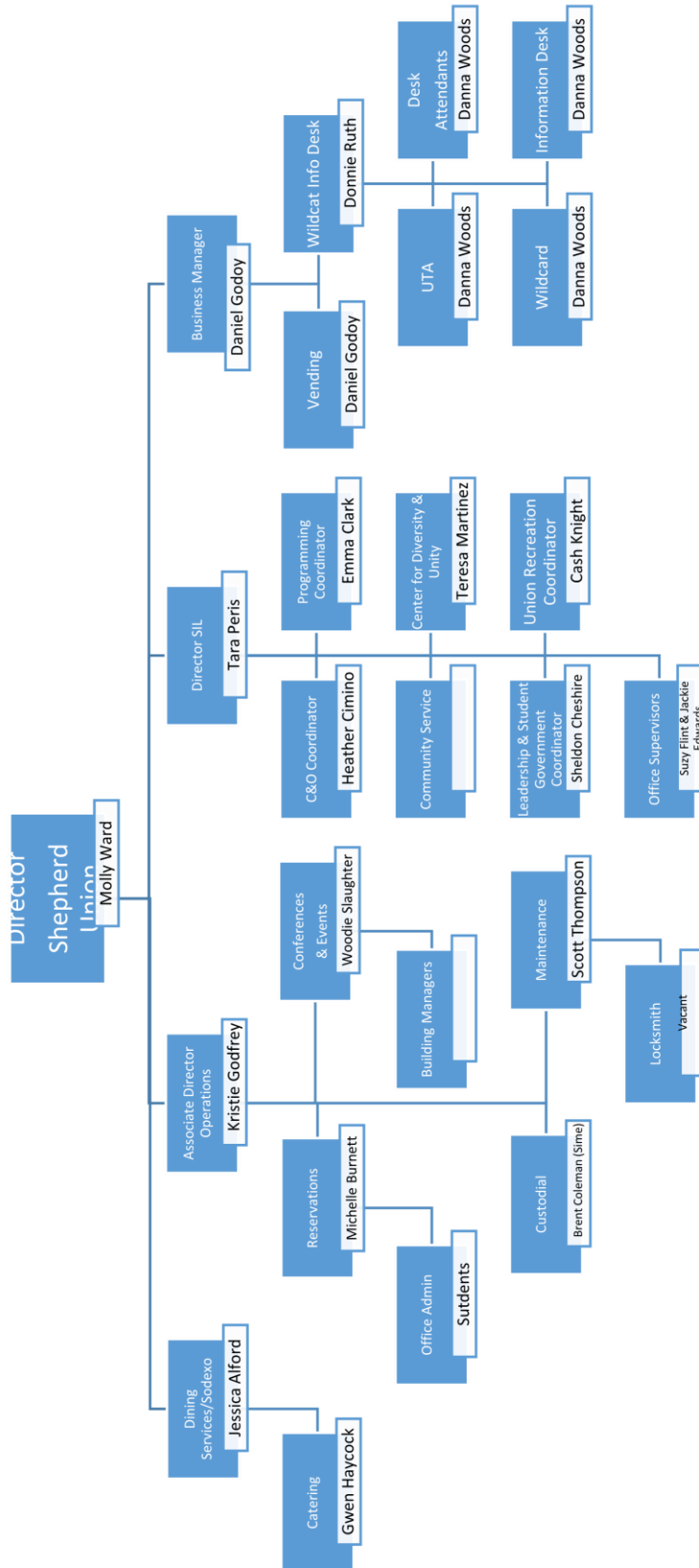
60% of students do not think that the Union provides leadership training or opportunities to serve in a leadership role. This compares to 51% at Select 6 institutions and 50% at all other institutions that administered this survey.

58% of students do not think that the Union provides opportunities for students to assume a leadership role. This compares to 49% at Select 6 institutions and 48% at all other institutions that administered this survey.

61% of students are satisfied with the extent that the Union publicizes opportunities to join student organizations. This compares to 66% at both Select 6 institutions and all other institutions that administered this survey.

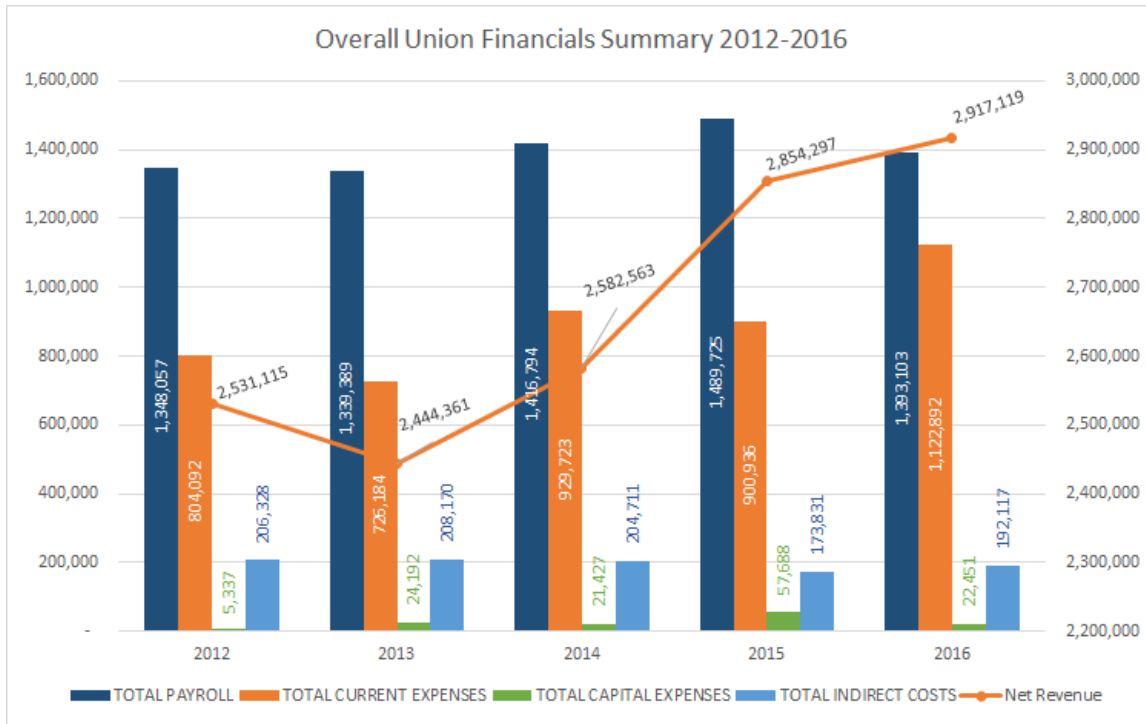
52% of students feel that the Union expands their understanding of others whose backgrounds differ from theirs. This compares to 55% at Select 6 institutions and 52% at all other institutions that administered this survey.

Booking Stats 2012-16												
Weber State University - Shepherd Union												
Group Type	2010-11		2011-12		2012-13		2013-14		2014-15		2015-16	
	Bookings	%	Bookings	%	Bookings	%	Bookings	%	Bookings	%	Bookings	%
Miscellaneous	36	0.48	13	0.12	269	2.34	318	2.84	451	3.90	600	5.12
Clubs & Organizations	1082	14.62	1363	13.53	896	7.8	776	6.93	778	6.72	1138	9.72
Community Guest	47	0.63	26	0.25	36	0.31	30	0.26	36	0.31	44	0.37
For Profit	157	2.12	249	2.47	208	1.81	246	2.19	276	2.38	255	2.17
High School	4	0.05	8	0.07	8	0.06	7	0.06	29	0.25	10	0.08
Individual	0	0.00	2	0.01	9	0.07	0	0.00	6	0.05	17	0.14
Non-Profit	65	0.87	106	1.05	38	0.33	138	1.23	78	0.67	272	2.32
Schools	0	0.00	37	0.36	24	0.2	18	0.16	21	0.18	12	0.1
SIL	677	9.14	798	7.92	1418	12.35	1,723	15.40	1,517	13.12	1399	11.95
Summer Conferences-Non-Profit	90	1.21	223	2.21	290	2.52	327	2.92	564	4.87	331	2.82
University	5,242	70.83	7244	71.94	8279	72.14	7,603	67.96	7,805	67.51	7628	65.16
Total	7,400	100	10,069	100	11,475	100	11,186	100	11,561	100	11,706	100



Weber state Union Building
Balance Sheet
Fiscal Years 2012-2016

Assets	2012	2013	2014	2015	2016
Cash in Bank	379,005.52	352,521.32	309,085.41	302,831.93	183,146.64
Accounts Receivable	46,651.35	94,259.42	201,065.58	218,472.52	255,198.40
Less: Allowance for Doubtful Accounts	(678.00)	(1,691.00)	(3,789.00)	(4,109.00)	(4,900.00)
Inventory	9,181.39	10,288.28	6,006.24	9,109.69	8,168.64
Deposits	5,093.34	4,534.08	-	-	-
Total Assets	439,253.60	459,912.10	512,368.23	526,305.14	441,613.68
Liabilities:					
Early Retirement Payable	-	-	-	-	-
Vacation Payable	-	-	-	-	-
Accounts Payable	-	-	37,266.20	-	-
Deposits - Key & Wildcat Cash	37,109.69	39,503.25	46,299.01	54,645.07	57,688.33
Fund Balance	402,143.91	420,408.85	428,803.02	471,660.07	383,925.35
Total Liabilities and Fund Balance	439,253.60	459,912.10	512,368.23	526,305.14	441,613.68



Overall Shepherd Union		2012	2013	2014	2015	2016	Average	Distribution
Revenues	Revenue Budget	-	-	-	-	-	-	0.0%
	Student Fee Apport	903,517	915,820	937,291	1,035,172	1,053,432	969,046	36.3%
	Total Commissions	149,473	207,404	171,431	162,055	204,665	179,006	6.7%
	Rent	401,587	359,075	376,284	382,412	354,268	374,725	14.1%
	Lanes	73,604	69,646	62,451	60,005	57,171	64,575	2.4%
	Cards	86,819	91,165	92,595	75,085	76,771	84,487	3.2%
	Events	453,433	338,157	475,728	650,386	710,863	525,713	19.7%
	Other	462,681	463,095	466,783	489,182	459,950	468,338	17.6%
Net Revenue		2,531,115	2,444,361	2,582,563	2,854,297	2,917,119	2,665,891	100.0%
Expenses	Payroll	1,348,057	1,339,389	1,416,794	1,489,725	1,393,103	1,397,414	55.5%
	Current Expenditures	804,092	726,184	929,723	900,936	1,122,892	896,765	35.6%
	Capital Expenditures	5,337	24,192	21,427	57,688	22,451	26,219	1.0%
	Indirect Cost	206,328	208,170	204,711	173,831	192,117	197,031	7.8%
	Total Expenditures		2,363,813	2,297,935	2,572,656	2,622,179	2,730,563	2,517,429

Wildcard Services/Information Center Financial Summary

Info Desk	2012	2013	2014	2015 (**)	2016	Average	Distribution
Revenues							
Revenue Budget	-	-	-	-	-	-	0.0%
Student Fee Apport (*)	82,908	101,041	93,345	79,310	102,021	91,725	49.5%
Total Commissions	-	-	-	-	-	-	0.0%
Rent	-	-	-	-	-	-	0.0%
Lanes	-	30	80	50	60	44	0.0%
Cards	86,819	91,165	92,595	75,085	76,771	84,487	45.6%
Events	5,970	5,950	8,440	5,875	9,580	7,163	3.9%
Other	38,933	18,703	14,075	36,478	19,913	25,620	13.8%
Resale-Other	(37,244)	(19,786)	(11,268)	(27,477)	(22,559)	(23,667)	-12.8%
Net Revenue	177,385	197,102	197,267	169,322	185,786	185,372	100.0%
Expenses							
Payroll	65,238	66,684	93,733	95,986	98,556	84,039	36.4%
Current Expenditures	152,697	148,134	153,235	30,012	173,653	131,546	56.9%
Capital Expenditures	-	10,670	7,705	45,465	13,823	15,533	6.7%
Indirect Cost	-	-	-	-	-	-	0.0%
Total Expenditures	217,936	225,489	254,673	171,463	286,032	231,119	100.0%

(*) Adjusted Student Fees since this revenue is received in an expense account.

(**) Due to a change in the Blackboard payment date, the payment for the fiscal year 2015 went through in 2016, making 2015 current expenses lower than usual.

SEC Financial Summary - Conferences

Conferences	2012	2013	2014	2015	2016	Average	Distribution
Revenue Budget	-	-	-	-	-	-	0.0%
Student Fee Apportionment	-	-	-	-	-	-	0.0%
Total Commissions	-	-	-	-	-	-	0.0%
Net Revenue	-	-	-	3,359	10,131	2,698	1.5%
Salaries	-	-	-	-	-	-	0.0%
Benefits	-	-	-	-	-	-	0.0%
Depreciation	351,651	269,582	421,515	631,761	685,940	472,090	98.5%
Other	1,417	10,766	-	-	-	2,437	0.0%
Net Revenue	353,068	280,347	421,515	635,119	696,071	477,224	100.0%
Payroll	7,457	15,452	20,905	13,540	14,928	14,456	2.4%
Current Expenditures	317,947	173,483	325,017	510,392	611,998	387,767	97.6%
Capital Expenditures	-	-	-	-	-	-	0.0%
Direct Cost	-	-	-	-	-	-	0.0%
Total Expenditures	325,404	188,934	345,922	523,931	626,926	402,224	100.0%

SEC Financial Summary - Operations

SEC Operations	2012	2013	2014	2015	2016	Average	Distribution
Revenues							
Revenue Budget	-	-	-	-	-	-	0.0%
Student Fee Apport	-	-	-	-	-	-	0.0%
Total Commissions	-	-	-	-	-	-	0.0%
Rent	28,997	28,021	36,225	28,223	3,395	24,972	21.7%
Lanes	-	-	-	-	-	-	0.0%
Cards	-	-	-	-	-	-	0.0%
Events	92,711	56,573	39,359	9,209	12,200	42,010	78.1%
Other	160	232	-	-	20	82	0.1%
Net Revenue	121,868	84,826	75,584	37,432	15,615	67,065	100.0%
Expenses							
Payroll	206,334	214,766	172,538	201,778	204,586	200,000	89.2%
Current Expenditures	63,481	73,328	108,604	28,329	24,876	59,723	10.8%
Capital Expenditures	-	-	-	-	-	-	0.0%
Indirect Cost	-	-	-	-	-	-	0.0%
Total Expenditures	269,815	288,094	281,142	230,106	229,462	259,724	100.0%

Wildcat Lanes/Union Recreation Financial Summary

Wildcat Lanes	2012	2013	2014	2015	2016	Average	Distribution
Revenues							
Revenue Budget	-	-	-	-	-	-	0.0%
Student Fee Apport	-	-	-	-	-	-	0.0%
Total Commissions	-	-	-	-	-	-	0.0%
Rent	24,700	20,330	20,555	29,584	25,076	24,049	25.9%
Lanes	73,604	69,616	62,371	59,955	57,111	64,531	58.9%
Cards	-	-	-	-	-	-	0.0%
Events	3,101	6,028	6,414	3,541	3,143	4,445	3.2%
Other	24,559	25,333	27,404	24,317	12,231	22,769	12.6%
Net Revenue	120,025	121,306	116,744	117,396	96,927	114,480	100.0%
Expenses							
Payroll	125,460	109,676	116,957	123,561	76,997	110,530	77.4%
Current Expenditures	34,415	38,988	45,891	39,939	22,461	36,339	22.6%
Capital Expenditures	-	-	-	-	-	-	0.0%
Indirect Cost	-	-	-	-	-	-	0.0%
Total Expenditures	159,875	148,664	162,848	163,500	99,458	146,869	100.0%

Custodial and Maintenance Financial Summaries

Custodial	2012	2013	2014	2015	2016	Average	Distribution
Payroll	322,026	327,813	362,144	397,349	378,476	357,561	82.7%
Current Expenditures	86,427	75,783	80,976	83,118	77,277	80,716	16.9%
Capital Expenditures	2,737	-	-	-	2,162	980	0.5%
Indirect Cost	-	-	-	-	-	-	0.0%
Total Expenditures	411,190	403,596	443,120	480,467	457,916	439,258	100.0%
Maintenance	2012	2013	2014	2015	2016	Average	Distribution
Payroll	101,699	92,788	99,595	96,383	97,805	97,654	47.0%
Current Expenditures	83,519	85,925	105,261	107,132	110,213	98,410	53.0%
Capital Expenditures	2,600	-	1,406	42	-	810	0.0%
Indirect Cost	-	-	-	-	-	-	0.0%
Total Expenditures	187,818	178,713	206,262	203,557	208,017	196,874	100.0%

Key Request Form

(Must be filled out by each individual requesting key(s))

- Obtain a yellow Cashiers card from Shepherd Union Administration Office Supervisor, room #406
- Take the yellow card and this form (fully signed) to the Cashiers in the Student Services Center, to pay the deposit fee*.
- Return the completed documents including, this form the yellow card and the original receipt of deposit payment to the Union Administration Office Supervisor.
- If available, you will receive your keys at that time or you'll be contacted when key(s) are ready to be picked up. Keys that need to be made are usually ready in two business days.
- Contact the Union Administration Office Supervisor at 626-7641, regarding any questions about keys for the Shepherd Union.

Original Issue
 Lost Key
 Broken Key
 Exchange (approval required)

Person Requesting Key(s):

Print Last Name: _____

Print First Name: _____

W number: _____

Phone Number: _____

Club/Org: _____

Position: _____

Faculty
 Staff
 Student
 Hourly
 Other _____

Approving Signatures:

Supervisor: _____

Date: _____

Supervisor name (print): _____

Phone #: _____

Union Director: _____

Date: _____

Requested Key(s)

Department	Key #	Sq. #	Tag #	Room

Signature of person receiving keys

Date

***One-time refundable key deposit for WSU Personnel and students of \$25.00**

Pursuant to WSU Lock and Key Policy (PPM 5-44), I understand that any keys issued to me must be returned upon transferring to another department or termination of employment or student status with the University. If keys are not returned, the deposit will be forfeited and transcripts/paychecks may be held until keys are returned or replacement fee is paid. Keys will remaining the property of the University and may not be duplicated.

****"Other Personnel"** is defined as anyone working at the University with a need for access to a keyed space, which does not fall in the "WSU Personnel" category. This will include contractors, consultants, visitors, etc. A deposit of \$100.00 will be required. This deposit will be refunded upon the return of said key(s) to the Union Administration secretary. WSU student Affairs Administration reserves the right to waive the deposit fee.

Key Distribution process:

- Employee (and preferably supervisor) comes in to request key. Give them:
 - The Key request form
 - Determine the key needed and the next available sequence, write it on the form.
 - Have Bill or Monika sign, if available; if not the employee will need to bring it back after getting other signatures, before going to cashier
 - Yellow ¼ page Office of Cashier form
 - Circle 'Key Deposit (\$25)' and write UB16 next to it. That is the deposit code
 - Also complete the top section of the form
- The employee will then take the forms around for appropriate signatures then to the Cashiers office in the Student Center to pay the refundable deposit fee.
- They will come back with a receipt and the two completed forms. Keep the original of all three, staple together and place in the key book (located in the storage closet), in alphabetical order
- Use the book to determine if the key needed is in the key box (table at back of the book)
- Handwrite that the key has been distributed and then record the correct information on the table in the front of the book.
 - Then enter the information into the excel spreadsheets.
- Make sure the supervisor is aware of the request and double check the rooms for which to give access to.

Key return and refund:

- The employee will bring the key back
- Confirm that it is the same key that was given them.
- Locate the forms for the original distribution. Complete the backside of the ¼ pg yellow form by having Bill or Monika sign off on the return
- Make a copy of the forms and keep those copies.
- Then give the original receipt and yellow form back to the student so they can take it to the cashier for the refund.
- Log the returned key back into the Keybox tab of the spreadsheet (both hard copy and soft copy) and put the key back in the key box, located in the storage closet.

Misc:

- If the needed key is not in the key box, request a key cut from Housing Maintenance; preferably by email: maintenance1@weber.edu. Zach and Robert are the key techs. They would normally have the key made within 24 hrs.
- The excel spreadsheet has two tabs:
 - Key Chart – Showing all employees of all departments and what keys they have, identifying the key type and sequence number
 - Key Box – Shows all the keys we have currently available for distribution in the storage room, including key type and sequence and what Tag (key chain) they can be found on.
- Sequence means the number that has been cut of that same key.

SEC Total Bookings PER Fiscal Year

Total Bookings Per FY					
2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
7,400	10,069	11,475	11,186	11,561	11,706

Six Column Model

Results

Appendix N

Weber State University Student Affairs 6 Column Model			
Shepherd Union			
Unit Goal(s)	Means to Achieving Goal Objectives)	Student Learning Outcome	Methods of Assessment
Offer a variety of personal and professional development learning opportunities for Shepherd Union student employees.	1) Implement formal trainings for job specific skills for each area in the union. 2) Facilitate ongoing community building opportunities to increase student employee retention 3) Implement when to work software 4) Offer ongoing leadership and professional development trainings for student employees 5) Actively recruit underprepared and underrepresented student employees	1) Critical Thinking and problem solving: Identify issues, reflect, and creatively develop solutions. 2) Increased feeling of connectedness with WSU over time	1) Pre and post survey as well as survey's following applicable workshops. 2) Pre employment and post employment survey.
Learning Enhance Shepherd Union Sustainability efforts	1) Develop post consumer compost plan and further educate students on proper composting techniques. 2) Develop a recycling model for the Union Building to increase the amount of material being recycled especially for large catered events.	Education on recycling methods and effectiveness. Education on methods of post consumer recycling.	Increased number of recycling bins in the Union, Pre and post test of community members to measure knowledge of post consumer recycling. Measure recycling bags used throughout the year to create a baseline for recycling measurement.
Learning Create and enact a 5 year capital plan to include renovation of space and updates throughout the union.	1) Create a detailed plan of how to systematically update furniture, fixtures, & equipment. 2) Complete cost projection on all items 3) Identify areas in need of construction or remodel	NA	5 year plan completed to satisfaction
other Recruit and hire a more diverse student employee base.	collaborate with Center for Diversity and Unity, womens center, and internaional student and scholars center in recruiting student employees, create marketing materials to recruit student employees and distribute to relevant student orgs and on campus department.	cultural competency skills, experience working with diverse populations	surveys to identify diversity within our staff. 10% of Student Union employees will identify as non-caucasian. Pre and post test regarding cultural competency, measure staff and students.
Learning			

Capital Plan 2016-2021

Appendix O

Area	Item Description	Cost	Replacement Year	
Ballroom Project	6000 lumen Projector		2016	recommend same model as in wildcat theater so we have 1 type of bulb, and if we do 5 we can make ballroom c like ballroom A. I also recommend that the current ballroom B projector be moved to the wildcat room. recommend hookups at the plates and each tower recommend these be fixed we get requests to capture presentations. I recommend this anywhere we have a house system installed for ease of presentation display for more control of the sound quality can be removed and put in to as needed inventory, suggest 2 shelves one for mixing board and one for the use by client ie to hold Ipods Recommend so that ballroom C can be configured same way as ballroom A
Ballroom Project	Hdmi Hookups		2016	
Ballroom Project	RCA Hookups		2016	
Ballroom Project	Video / Audio Output		2016	
Ballroom Project	Blueray player		2016	
Ballroom Project	Apple tv		2016	
Ballroom Project	Mixing board		2016	
Ballroom Project	VCR and Tape Deck		2016	
Ballroom Project	Moterized Screen for C north wall		2016	
Skyroom Project	Projector Upgrade		2017	
Skyroom Project	Wiring Upgrade		2017	
Skyroom Project	Blueray Player		2017	
Skyroom Project	2 wireless Mics/ side		2017	
Skyroom Project	Video/ Audio Output		2017	
Wildcat room project	HDMI/VGA ready Projector		2018	Recommend we use current ballroom b projector in this space for now
Wildcat room project	Ports in wall for RCA, HDMI, XLR, 3.5 audio		2018	
Wildcat room project	Speakers in ceiling		2018	
Wildcat room project	Apple TV		2018	
Wildcat room project	Shelf like in CDU for Laptop and/or other supplies		2018	
Wildcat room project	Built in Wireless Mic		2018	
Portables Project	Battery Powered	3000	2019	
Portables Project	Battery Powered	3000	2019	
Portables Project	Parade Soundsystem	5000	2019	
Portables Project	Mid range unit 5000+ sys	10000	2019	
Portables Project	Big 10000+ people system	20000	2019	Recommend of the 3 big systems get the Mid range moves to Float/ Outdoor system, The Upper range system Move to our Mid range use and only get a Upper range model.
Wildcat Theater Project	Projector Upgrade ie 10000 Lumens		2020	

Area	Item Description	Cost	Replacement Year
Portables Project	Battery Powered	3000	2019
Portables Project	Battery Powered	3000	2019
Portables Project	Parade Soundsystem	5000	2019
Portables Project	Mid range unit 5000+ sys	10000	2019
Portables Project	Big 10000+ people system	20000	2019
Wildcat Theater Project	Projector Upgrade ie 10000 Lumens		2020
Wildcat Theater Project	Wiring Upgrade HDMI 2.0		2020
Wildcat Theater Project	Screen Care		2020
Wildcat Theater Project	Chair reupholstery		2020
Wildcat Theater Project	Sound Board in Booth		2020
Wildcat Theater Project	Sound System Upgrade ie. New speakers		2020
Wildcat Theater Project	Blueray Player in booth and box		2020
Computer Rotation			4/yr
Direct Box Rotation			2/yr
Apple TV Rotation		\$200e	1/yr
Computer Remotes		\$100e	4/yr
Portable Projectors			2 to start then 1/2yrs

I recommend the Parade soundsystem be given to the SIL department as I understand they are incharge of the float and we could use the storage space. We would not be responsible for maintenance or setup.

Recommend of the 3 big systems get the Mid range moves to Float/ Outdoor system, The Upper range system Move to our Mid range use and only get a Upper range model.

I like the current proposal for 6 wireless mic/ear worn mic and current sound abilities of the system

FYI about computer rotation: All new computers go into Tier 1, Tier 2 goes to Tier 2, etc.
Tier 1: Ballrooms A, B, C, Senate Chamber
Tier 2: Skyroom A, B, 316, 312
Tier 3: 305, 321, Wildcat Theater 1, 331
Tier 4: Wildcat Theater 2, Wildcat Room, 405, Lair
Tier 5: Float 1, 2, 3, 4, Mac

* all laptops after tier 5 still considered useful are allowed out of the building, i.e., Housing (during summer) or outdoor activities

Capital Plan 2016-2021

Area	Room number	Carpet Type/Color	Cost	Replacement Year	
Dinning skyroom		Light with purple boarder Yellow with green leaves		2016 2016	This needs to be done every 2-3 yrs
Wildcat Rm, Wildcat Th. Hall in front Ballrooms		Light Dark right outside ballrooms light everywhere else			
1st Floor entrance West Mezz East Mezz Lounges North hall 4th Floor Info area Class/Meeting rooms Offices		Light only Light with purple lounge area Light with purple boarder Light with purple accents Light only Light only Light only Light only Light only			It seems to get more dirt than normal due to it being right at the entrance from an outside door.

FYI: There was talk about getting me 1 pallet of the light carpet to tide my team over until a recarpeting

Staff Profile

STUDENTS TABLE 2 STUDENT AFFAIRS STAFF PROFILE Form used in NWCCU Accreditation				
	Professional	Support	Student	Other
Female	11	7	17	
Male	9	7	15	
Degrees:				
PhD, EdD				
MD, JD, MSW	0			
MA, MS	9			
BA, BS	1			
AA, AAS, Certificate, etc.	3	4		
Years Experience in field:				
None	2			
Less than 5		2		
5-10	8	2		
11-15	3			
16-20				
More than 20	6	3		
Full-time:				
9/10 months	0	0		
12 months	20	8		
Part-time:				
9/10 months	0	0		
12 months	0	6		

Appendix Q

Five-Year Plan: 2017 - 2021

Expense or Activity	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
Wildcat room AV installation	5,000				
Small conference room AV upgrade	10,000				
Reupholster lounge furniture 4th floor	4,650				
Reupholster lounge furniture 2nd floor	38,000				
Replace carpet 3rd floor public spaces	85,000				
Replace carpet 4th floor office spaces	10,000				
Handrails east side	8,000				
Ballroom window treatments	15,000				
Custodial equipment upgrade	15,000	10,000			10,000
Conference furniture replacement/upgrade	20,000	20,000	20,000	20,000	20,000
Kitchen equipment upgrade	25,000	5,000	10,000	6,000	15,000
Painting	15,000	15,000	15,000	15,000	15,000
Sky room AV upgrade		10,000			
Replace carpet 3rd floor office spaces/ conference rooms		85,000			
Replace carpet Bowling/Billiards		25,000			
Reupholster lounge furniture 3rd floor		52,000			
Bowling equipment upgrade			20,000	20,000	
Replace carpet Wildcat theater/Fireplace lounge			25,000		
Eastside Elevator White Tile (2,3,4 floors)			15,000		
Update signage and wayfinding			10,000		
Wildcat theater AV upgrade			30,000		
Office furniture upgrade				15,000	15,000
Heat Exchanger - East Side				15,000	
Loading Dock Elevator Upgrade				30,000	
Maintennace truck				20,000	
Loading Dock Lift					15,000
Handrail - Outdoor West Side (Theater)					20,000
Student Services Bridge Air Flow					5,000
Atrium Floor					85,000
Total	250,650	222,000	145,000	141,000	200,000