

**THE CANADIAN ASSOCIATION
OF BUSINESS STUDENTS**

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CABS F2016 ANNUAL REPORT

Prepared by:
CABS Management Team F2016

CABS Statistics for F2016

President	Finance
5 Monthly Updates for the BOD 2 Quarterly Reports 1 Annual Report 10+ Memorandums 7 New Programs 1 Program Acquisition (\$1MM+ Value) 5 New Policies 3 Corporate Directives 2 New Administration Software Solutions 1 New Project Plan Template 5+ Procedural Documents 10 New Head Office Directors	200+ Hours of Bookkeeping 70+ Cheques Created 10+ Governing documents written/developed \$100,000+ Recovered From Budget Issues 1,000+ Financial documents created (e.g. receipt, proof of payment, invoices, etc.)
Marketing	Corporate
686 New Facebook followers 46% Annual social media followership growth 5 Successful social media campaigns 11 New program and event logos 1200+ Customized Delegate Tags 13,000+ Organic post reach record 4 Event promotional packages 8 Event materials templates produced 10+ Website resource tables created	\$125,000 Worth of Contributions 44 Individual Partnerships Double Digit JDCC Growth 30 New Partnerships Nationally Streamlined Process Achieved Target on 4 of 5 Flagship Events Strong ELCD Integration
External	Conferences
1 Program Acquisition (\$1MM+ Value) 3 Student Servicing Programs Executed 3+ New Initiatives in the works 1 New National Media Relationship	4 Executed Events 4 Flagship Event Bids for F2017 5+ Operational Templates 1 Reporting Template 4 event promotional packages 30+ Alumni engaged
Competitions	Members
30 Competitions and conferences promoted through our events calendar 1 Executed JDCC 4 New JDC Central Supporting Documents 3 Interested Schools for JDCC 2017 15 Updated job descriptions 1 New JDC Central Governing document	45 Hours of Member Calls 3 New Member Applications 2 New members 8 Updated job descriptions 3 Webinars 25+ Member Profiles Created

Executive Summary *(Written By Calvin Parker)*

The fiscal 2016 year for CABS was a period of both accelerated organizational development and internal improvement for the association. New offerings to the membership were conceptualized, developed, and executed, while portfolios such as marketing, finance, corporate, secretary, and external were completely revitalized and made sustainable.

Our largest triumphs include the execution of each conference and competition, the solicitation of bids for every flagship event for the fiscal 2017 year, the development of seven new programs, a comprehensive governance structure from policy to procedure for sustainability and oversight, a new standard in administrative systems and process, full reconciliation of corporate finances, and external partnership and eventual acquisition of a national organization. These are significant achievements and should be recognized as such - though there are still many exciting possibilities and opportunities ahead for the organization, it is that much closer to capitalizing on them.

Our largest failures centered around Program Team performance and accountability. CBSC, JDC Central, and CABS Roundtable served as important lessons for the CABS Management Team, with severe financial pressures that required decisive and immediate action from our leadership. While CABS evolved organizational model of centralized portfolios and internalized departments has significantly improved program sustainability and mitigated more varied outcomes, it also requires more management and direction from its team of executives. While this additional responsibility is well worth the improved outcomes, it is worth noting that more lateral oversight and further control will need to be exercised by the executives and board of the organization, through the improved governance we have created. Another encountered difficulty related to corporate partnerships - due both to insufficient focus, unsuitably short lead times to certain events, and the general and current economic landscape in Canada, which has also affected the majority of our members. In regards to our events, greater care must be taken to ensure continued financial viability.

Considering the advancements made in fiscal 2016, CABS is ideally situated for growth and opportunity as it continues to execute more fully on its mandate. Overall, this year's executive team believes this to be a very significant year for CABS, and it would not be possible without the engagement and support of the membership - thank you for your patience, your investment, and overall, your continued belief in CABS and it's mandate.

President *(Written By Calvin Parker)*

Overview

This report largely signifies the end of my two years as a CABS Executive. After learning of CABS as the University of Victoria Commerce Students' Society President in F2014, and thus a BOD member of the corporation, I remember the excitement I felt by uncovering this new network and community of other business student leaders. Through attending CABS events, I experienced the value that came from building connections with your peers at universities nationwide. While these conferences provided benefit to me and my fellow executive, I saw the potential for greater value that the organization could provide, which inspired me to run for an executive position. However, with the ambiguity of the then-strategy, coupled with the obvious accountability and performance issues that had become synonymous with CABS' executives, many potential executives were deterred from contributing - the organization received few candidates for the following year. I viewed CABS as a challenge, but also an opportunity - which is why I ran in F2015 for two executive positions, took further responsibilities on within that year, then recruited an entire slate for F2016. The individuals that comprise this year's Management Team have been among the most talented, capable, and ambitious student leaders I've yet had the opportunity to work with. Together, we were unified in our vision and aligned in our pursuit of it.

Our largest ambitions for CABS revolved around developing it into not just a corporation by definition, but by design - functioning like a business, with defined structure, cohesive strategy and objective alignment, processes, governance, reporting, and above all, tangible services. We believed, and continue to believe this is necessary for performance, sustainability, legitimacy, and future growth. Collectively, we are satisfied with the progress made in this area. Through any organization will continually need refinement, CABS, internally, is benefiting exponentially from systems and process. It's taken on a more structured operational model, which is paramount for a virtual organization and the respective services it can deliver. Advancements in this area include a cohesive governance solution, including bylaws, policy, directives, and procedures, administrative standards, include a centralized cloud document storage system, standardized accounts, shared task management software, a service-orientated web presence, and collective contact lists. With executives and employees working remotely and often individually, effective outcomes will continue depend on the reliability of defined workflows - remove ambiguity, and achieve consistency in results.

In alignment with internal development was external development, in terms of member facing deliverables - programs and services that could our benefit our member executives beyond our flagship events remains extremely important to me, as not every executive, much less every business student, can attend events - I am constantly mindful of finding ways to provide value to the greatest number of our membership, with a long-term focus on more tangible benefits for all business students. Our foray into programs and services has seen positive feedback from the membership and I am excited to witness their future development.

Finally, we attempted to shift the very purpose of the organization. Previous mandates focused on providing advice and counsel to Business Student Associations - our focus was on providing our members with more channels, mediums, and opportunities for members to facilitate their

own improvement within their network. While connecting our membership with alumni remains an integral offering, it is now complemented by a range of opportunities to develop professionally through organic immersion in our services. We believe this change in approach was positively received, and has served to strengthen weakened memberships and restore faith in our overall vision and purpose.

Presidential Portfolio by Numbers

- 5 Monthly Updates for the BOD
- 2 Quarterly Reports
- 1 Annual Report
- 10+ Memorandums
- 7 New Programs
- 1 Program Acquisition (\$1MM+ Value)
- 5 New Policies
- 3 Corporate Directives
- 2 New Administration Software Solutions
- 1 New Project Plan Template
- 5+ Procedural Documents
- 10 New Head Office Directors

Successes

Website

CABS has now developed a reputation for an organization with an ever-evolving web presence - or perhaps more accurately, one with an ever-developing website. The CABS website has seen several versions of deployment since the inception of the organization. While the current website is still not complete, considering our limited resources, I am exceedingly proud of this resource as a deliverable of CABS. Creating something of this infrastructure and capability would have cost far more than CABS could have afforded as a professional service, and for that I sincerely thank Adam Normand, long-time CABS Executive turned webmaster, for all his assistance and guidance on this expansive project. Existing and developing functionality has been instrumental in delivering more resources, services, and information to our members. User forums, document accessibility, a Conference Calendar, executive contact lists, centralized deliverable lists and communication, and informational resources - services that are integral to our value proposition and services that are ideal candidates for continuous development.

As a geographically dispersed and mostly virtual organization, the CABS website needs to remain a large focus, if not the largest outside of events in the short-term - CABS is very much evolving into a IT company with affiliated services, and a functional and feature-offering website is the foundation from which to build more related offerings and associate value.

New Programs

A fundamental target to be encompassed by this year's action was to ensure CABS would finally evolve beyond offering only events to its membership - this year, we have provided programs and services that include Member Accreditation, CABS Member Forums, CABS

Document Depository (online member resources), CABS Member Profiles, CABS Member Intelligence, CABS Executive Development Program, and the 5 Days for the Homeless acquisition.

While we are proud of the development of these programs and the beginning of their execution, further success will require additional processes for maintenance, delivery, and updates. Essentially, while some are fully created and available to the membership, others will need future executives to continue on with their deployment.

Secured Events

Moving into F2017, CABS has secured bids for all five of its properties - including JDC Central, after two years of failsafe hosting measures. This is a significant achievement in itself, as CABS has rarely succeeded in fulfilling this requirement of its mandate throughout its history, and failed to do so for the last two fiscal years. This puts the organization in a strong position for the upcoming year in terms of resources - CABS can focus on the delivery of its programs without trying to maintain failsafe events or direct further effort into the solicitation of bids.

Challenges

Human Resources

For a significant part of its existence, CABS has had notable difficulty attracting candidates for its executive and director positions, and with the candidates it does receive significantly underperforming. A lack of oversight, primarily driven through the apathy attributed to marginal value offerings, is a major contributor for the lack of accountability and deliverables often witnessed by CABS Executives, Program Teams, and Directors.

This year's planned growth did not fully account for this underlying but often paralyzing issue, as it was expected that early successes and strong, visionary leadership would help ignite the passion that would develop cohesive and performing teams. However, significant issues were witnessed in event Program Teams, which contributed to most of the larger difficulties seen this year, including every financial situation that has developed over the course of the term. Head office directors, a first for the organization, were designed to allow the Management Team to focus on strategy and planning, but the general level of engagement and output did not provide much tangible benefits. Further, executive performance issues, including the eventual departure of the VP Conferences, increased the workload for the remaining team, and myself specifically, inhibiting some progress.

Due to related problems with execution, and combined with my desire to see through the execution of member-facing deliverables, in terms of services and programs, I shifted my focus to primarily operations for the majority of the year. Though strategy and planning was a priority for the first quarter, I spent the second and third quarters almost exclusively focused on our programs and related infrastructure. I felt it was necessary to ensure their completion, but future teams will need to put more emphasis on HR to ensure sustainable practices, with a focus on recruitment.

Organizational Purpose and Stakeholder Alignment

Though, in many respects, the direction of the corporation and its growing value proposition has never been more defined, there still remains a clear lack of congruence between the internal board and the external board, and by extension, the members. There have been multiple instances of CABS attempting to respond to insightful feedback from its constituents and delivering programs and services that respond to these communicated desires and needs, only to see these offerings under-utilized, or not completed due to lack of accountability on behalf of the membership to deliver on their required deliverables and inputs. Associations such as CABS are defined as a grouping of individuals coming together voluntarily to achieve a greater purpose, which requires varying levels of involvement from all relative parties. However, this definition is not always widely understood or internalized. As long as its employees and greater membership remain disconnected through a lack of alignment and perhaps an overall communication deficit, CABS will never be empowered to achieve a long term vision.

Currently, CABS most significant channel of communication and program delivery is through the Business Student Association Presidents of the membership, who together comprise the board of the corporation. My experience in CABS has taught me that Business Student Association Presidents, of which I was one, and for whom the following points would apply as well, are not consistently the ideal candidates to direct an association that is meant to represent all business students. The design has been practical - these individuals are already elected representatives of their faculties, and therefore can be easily aligned to board appointments. However, the also results in an additional position and responsibility by default, which many Presidents may be unaware of at time of election, and for which they may have no invested interest in. For the organization to develop further, it would be prudent to consider a differing board structure that utilizes a greater range of stakeholders, to represent a larger scope of interests and constituent needs, with at least a significant portion of the board elected from candidates who choose to seek the candidacy voluntarily. Additionally, and perhaps more importantly, this would provide the opportunity for board members to serve additional terms, allowing the corporation to benefit from experienced oversight and institutional knowledge.

Finally, CABS has experienced success from reaching out and communicating with other student executives at each member university. Based on the positive reception such efforts have received, especially in context of the burden it takes off Business Student Association Presidents, I recommend CABS continue to do more to engage directly with a greater range of stakeholders..

Future Considerations

With a large focus in F2016 on developing necessary internal structure, refining working processes, and creating more varied offerings, the corporation is now well positioned to maintain operations on existing services while continually developing other opportunities on which to grow its value proposition. For CABS to gain further awareness of its initiatives and to provide members with more reasons to get involved and invested with the organization, the F2017 Management Team would be well advised to focus more extensively on external marketing and engagement with partnering bodies. Bringing more awareness and positive perception to the significant accomplishments of CABS and its memberships provides more

context to our collective mandate, and will exponentially increase the benefits of a CABS member.

In the longer term, I wish to see the support that CABS provides to Business Student Associations become a reduced, but still significant and baseline purpose for the association - I think the greater value, and competitive advantage for CABS revolves around the united network of business students nationwide, where the collective whole is greater than the sum of it's parts. Unified initiatives, including 5 Days For The Homeless, showcase what we can accomplish in the power of numbers, and I'd like to see us pursue more opportunities to impact our country in a beneficial way while supporting the development of as many business students as possible.

Finance *(Written By Simon Bullock)*

Overview

When I began this year, I was focused on building. Creating solutions to persistent challenges that have held back the organization for too long and caused inter-year strife for both executives and members. I also wanted to focus on sustainable approaches to helping more members over a greater period of time. I have tried to address these issues through a series of large initiatives and new policies that will have an impact far beyond my time with CABS. My goals for the year were to help schools develop necessary governing infrastructure to grow, finance CABS in a way that respects our members diversity and unique strengths, and create sustainable ways for our organization to deliver on our core competencies via conferences and competitions. I have worked with team members to develop our unifying Member Accreditation Program, new bylaws, Board of Directors composition, new committee creation, membership due restructure, accountability and compensation measures, as well as addressing operational backlogs. I'm proud of the work done as it serves to move the organization ahead for years' to come.

While I may not have fully understood the depth of the challenges ahead, I took on a portfolio than had been underserved and, in some aspects, in disrepair. These inherited challenges hindered a lot of early progression through prolonged bureaucracy in transition and a backlog of necessary maintenance. Completing a drawn out bureaucratic transitions allowed me to hire talented assistance through Jean-Philippe (JP) Allen as the Director of Finance who played an essential role in mending years' of repair and maintenance. JP has been an imperative part of the finance portfolio on the bookkeeping front, as well as a contributor to many of my targeted initiatives in the year. Through our collaboration, I have been able to shift some attention to the necessary strategic initiatives despite constant operational urgency. Some of the proposed solutions are outlined in greater detail below.

Finance Portfolio by Numbers

- 200+ Hours spent bookkeeping
- 70+ Cheques sent
- 10+ Governing documents written/developed
- 7 Financial Reports Produced
- \$100,000+ salvaged from failing budgets

- 1,000+ Financial documents created (e.g. receipt, proof of payment, invoices, etc.)

Financial Reports (provided separately)

- Head Office
- JDCC
- WCLR
- ECLR
- CBSC
- RT16 (Forecast)
- CABSF17 Budget [Prospectus]

Successes

CABS Membership Fee Restructure

A persistent and unaddressed issue at CABS for years' has revolved around the structure of annual membership dues. CABS annual dues have been unable to capture both the contributions and extraction of member schools and also respect a school's ability to pay. This year I sought to resolve this challenge by introducing a new model tied to member's development and ability to pay via stratification of budget sizes. By increasing the strata of budgetary layers from a binary system, CABS will be able to better categorize member schools budgetary capabilities with mitigated adverse payment abilities. To incorporate member value into membership dues beyond a school's ability to pay, CABS will assess members organizational development and provide meaningful value through pointed governing infrastructure sessions, resources, and templates. This holistic approach serves to solve a multitude of issues previously unaddressed and lays the framework for greater service value and quicker member development. My proposed solutions have taken in years' of member feedback and seek to provide a greater diversity of value.

Compensation and Accountability Measures

A persistent difficulty for the corporation and its delivery of flagship conferences and competitions has been the stable, quality, and fiscally responsible delivery of our offerings. Our employee based model with Program Teams, formerly Organizing Committees, has unhinged ownership of results and internalization of financial outcomes. I sought out to create the framework that would promote and facilitate an accountable employee model through use of specific contracts and appropriate monetary incentives. By signing Program Teams to specific event deliverables and expectations and tying the financial success of the respective event, my proposed framework will foster the necessary conditions for successfully executed events. The variable and capped profit sharing model is designed to sustainably motivate, without undue financial risk, and drive necessary results with Program Teams.

The role of a CABS executive has grown in scope and responsibility since the corporation's inception and now warrants a meaningful amount of time and attention for the executive team. In order to address, even in a small capacity, the time, dedication, and overall performance of the executive team, I have introduced a new honorarium policy to be put into place for the Fiscal

2017 year. The honorarium respects the constraints of the corporation's finances while acting as a performance measure over the management team's term.

Full details of the proposal will be up for discussion at the next BoD meeting.

Bookkeeping Backlog

In addition to several new initiative planned for the year, a long overdue review and correction of past years' finances require significant attention. Over the first 2 quarters of my term, JP and myself overhauled several years of corporation finance's to allow us to make sound financial decisions in the future. Jean-Philippe was an essential talent in the project applying his extensive bookkeeping knowledge and expertise to challenging and often confusing circumstances. An estimated 100 hours were applied to this endeavor; not least than by Jean-Philippe. CABS' finance are now in a condition that allows for future growth and development through more accurate records and historicals.

Challenges

Flagship Event Financial Oversight

One of the primary measures of a VP Finance is annual budgeting for our core events. Unfortunately this year, I was unable to deliver to my own expectations and this board's expectations due to communication challenges and Program Team mismanagement by respective executives. My forecasts for our fiscal operations put the corporation at a deficit for the fiscal year. Despite my efforts to set obtainable financial targets for each of our events and communication of finance procedures and expectations, my efforts were undermined or ignored due to poor oversight from CABS Management team members for the respective events. Several times over the course of my term I was misled about the fiscal standing of our events by Program Teams when I checked for updates. Assured by experts, I was told that what I was seeing was not only accurate, but of no concern. Several times in my term I found those claims to be incorrect. I was brought in with minimal time to rectify events running devastating and corporation-ending deficits after weeks, sometimes months, of fumbled mismanagement and communicated false pretenses. Crippling forecasted event losses were a direct result of Program Team's with little to no regard for their fiscal responsibilities and lack of corrective management by their reporting managers. My guidance was sufficient in bringing forecasts to a breakeven standing in collaboration with VP Corporate Relations, Zac Hogg's, persistent efforts.

Consolation is found in that these challenges are isolated to the individuals involved in this fiscal year and are not borne through systemic failures. Appropriate accountability measures have since been drafted to mitigate future recurrences and operating cash available is sufficient for continued operations.

Further Development

The fiscal 2016 year taught our team and our organization many valuable lessons around Program Team management and the necessary levels of oversight and accountability for successful execution; these lessons are incomplete and will require further development by

future CABS Executive teams in order to attain sustainable long term operations. This remains a high priority for future years. Also made evident in my term is the need for a stronger transition process. My year started abruptly and unceremoniously upon election and was drawn out via missing information and resources for the first six months of my term. This lack of process resulted in poor file management for my first months in office as well as undue effort in lieu of knowledge. This remains a high priority for future years. As a young corporation, CABS has not experienced a period of stabilization and tuning necessary for operational sustainability. Nearly all aspects of function require review and improved efficacy to progress and reach our achievable potential. This remains a high priority for future years. Lastly, core CABS offerings, such as conferences and competitions, require optimization modelling and review to achieve necessary efficiency and sustainability. I will pursue this optimization for the remaining time in my term, however, the task will require subsequent modifications as our offerings mature. This remains a high priority for future years.

Competitions *(Written By Rose-Lyne Boghos)*

Overview

Case competitions have been a great part of my life for the last few years and they are something I am truly passionate about. Having been involved with JDC Central, I spent a lot of time analyzing the competition and comparing it to the original JDC since this is where I had started competing. I saw many areas where JDC Central could be improved and I took on this role because I wanted to be part of the changes that were going to revive the competition. Having been involved with the original JDC and other REFAEC competitions as well, and knowing what kind of tensions there has been between CABS and them in the last two year (mainly caused by the bid to host JDCC 2015 that I led when I was still a student), I wanted to initiate a new dialogue with them and start fresh.

I therefore entered my mandate with the following goals in mind:

1. Improve JDC Central
2. Ensure its sustainability
3. Promote case competitions across the country
4. Sign an agreement with REFAEC concerning the ability to host JDCC in Quebec
5. Build a basic case competition structure for all schools to use

Overall, I believe that I have accomplished most of my goals. My colleagues will all agree that we have been facing more challenges that we anticipated, some within our control to fix and some completely out of our control. In the next sections, you will be able to learn more about the challenges that I faced during my mandate and which areas were more affected than others by those challenges.

Competitions Portfolio by Numbers

- 30 Competitions and conferences promoted through our events calendar
- 1 Executed JDCC
- 4 New JDC Central Supporting Documents
- 3 Interested Schools for JDCC 2017

- 15 Updated job descriptions
- 1 New JDC Central Governing document

Successes

JDCC 2016 Review

It is no secret that JDCC Central has been a great challenge this year, you can read more about it in my Challenges section. Despite the HR and financial challenges we have faced with JDC Central, I am very happy with the event and how the weekend went. The Program Team addressed issues such as complaints from former sponsors about delegates not networking with them enough. They resolved the issue by recommending to alter the points allocation of the participation section, and by incorporating the delegate passport as well as the VIP cocktail. This year's event also addressed other areas of complaints such as the social competition, hospitality suite hours, the lack of food in isolation and more. While some complaints were more important than others, all were addressed and improved upon to the best capacity of the Program Team. Overall, the weekend went smoothly with no major logistical hurdle, no complaints from the hotel and with very positive feedback from our sponsors.

JDCC Bid Prospectus and JDCC Sustainability

When I decided to run for the role of VP Competitions, one of my priorities was to ensure that JDC Central would become more sustainable. In my opinion, the key to its sustainability relied more than anything on its schools bidding to host it. After gathering feedback from different parties as to why schools were not bidding to host JDCC, it was clear that a big part of the reason came from the fact that schools had lots of misconceptions about the bidding and hosting process. Based on the feedback gathered and on my own experience as JDCC Captain, I have built the following documents and content during my mandate:

A workshop presented to Captains at ECLR explaining to captains what CABS is, how it works and where do they fall in the grand CABS organizational structure. The workshop also covered the key aspects of being a captain, what is to be expected from them by the Program team and the CABS management team and how they should be preparing for their role. This workshop was followed by a presentation on how to bid for JDCC and on what to expect when hosting the competition.

Additionally, this workshop inspired two documents : The Captains Guide and the JDCC Program Team Guide. Both guide are an expansion of the workshop mentioned above and go into details as to what is expected from JDCC Captains and Program Team, what resources are available to them and what it will be like to work with the CABS management team.

Finally, the JDCC Promo Package was created. Meant to inform the public, faculty advisors and Deans about what JDCC is, the documents covers the history, the values and pillars of JDCC and the benefits it brings to schools and students.

With all this in mind, I am happy to say that a total of 3 schools have approached me this year to express their interest to host JDCC 2017. All three schools were serious in studying the feasibility to host this JDCC at their school. The first two schools had to drop their plan to host for several reasons, but I am happy to be presenting the third school's bid to host JDCC 2017 and therefore allow the competition to go back to its original format.

Promoting Case Competitions

As a strong believer of all the benefits, I really wanted to promote case competitions to our members. We were able to accomplish that thanks to our conferences and competitions calendar. Thanks to this tool, we have been able to promote 30 conferences and competitions hosted by our members schools. Gathering information about such events has also been a great way to engage communication with our members and learn about our members initiatives and projects.

Challenges

Relation with REFAEC

In last years, there has been tensions between The CABS and REFAEC. This tension was caused three years when a mutual member school, who participates in both JDC and JDCC, submitted a bid to host JDCC in Montreal. REFAEC stood against this bid, fearing that hosting two competitions of very similar names on the same territory might cannibalize sponsorship and consequently affect the success of both events. I began working on drafting an agreement that would allow JDCC to be hosted in Quebec as soon as I was elected and I attended two of their conferences to discuss this agreement. With the help of two former students of the University of Sherbrooke and with the help of the current REFAEC President, an agreement was drafted and presented to the Presidents of the REFAEC member schools in November 2015 before being presented to the REFAEC board in December 2015. The agreement was approved by the Presidents but unfortunately was rejected a month later by the REFAEC board. While the outcome is disappointing, I am still pleased with how far the discussions went and how the relationship between both associations are no longer as tense as they used to be.

Diversified Competitions Offerings

Going into this mandate, I was hoping to be relevant to all our members by providing documents that would help schools get started with case competition program or improve their current case competition program. In November, I realized that this project required more work than I anticipated and acknowledged that I needed help if I wanted to accomplish this. This is why I then went on to hiring a director. Unfortunately, after our first meeting, problems with JDC Central started surfacing more and more and all my attention was therefore director to the event. As a result, I was not able to properly onboard my director or delegate tasks to him. Due to my poor time and HR management, I was not able to fulfill this aspect of my portfolio.

JDC Central Challenges

JDC Central, overall, has been a very challenging experience this year. I walked into my mandate without even knowing if there would be a JDC Central. The first couple of months of my mandate were spent trying to work an agreement that would allow an interested school to host while also analyzing the possibility of hosting another failsafe in Toronto. By June we had to make a decision and went ahead with same venue as last year.

JDCC has been a challenging experience for several reasons. The Program Team and myself had to learn to work together with all the new documents and the new Program Team structure. But it was mainly a challenge given how little time there was to put such a large event in place and gather a full Program Team, which was not finalized until the fall.

Further Development

Based on my experience of this past year, here are the areas of the competitions portfolio that I believe should continue to grow:

- JDC Central process to host : While documents such as the JDCC Promo package and the Program Team Guide help get a better understanding of what is required by our members to host JDCC, getting faculty on board still seems to be a challenge. I believe that in the near future, the VP Competitions should approach faculties to educate them on the benefits of hosting JDCC.
- Promoting case competitions: The competitions calendar was a great first step to promote our members case competition initiatives but for future years, I would recommend to also promote more actively international case competitions and international opportunities to our members.

Members *(Written By Jessica Gutierrez)*

Overview

Fresh from my experience as a President and Board Member of CABS, I took on this role to enhance the quality and value of the learning offerings provided by CABS and reach out to current and prospective members to expand the CABS network. At the start of my mandate, my goals were to:

- Be the main contact with the presidents for CABS-related inquiries as well as act as a sounding board (if I didn't have the answer I would find it!)
- Connect with 3 new member schools and schools who have not been as involved with CABS
- Get the long-awaited Resource Centre up and running

Overall, I would say that I met or addressed these goals in a meaningful way throughout my mandate. I am very glad to have gotten to talk to each and every F2016 president within the CABS circuit to understand your goals for your terms - being able to connect with you at the beginning was so integral to the building a communicative relationship throughout the term. I am also proud that we brought in 2 new members during my term (more details below) and connected with many more schools who will very likely have future involvement with CABS.

As a team, we were ambitious with member programs and deliverables that we worked on and brought to the Board of Directors for approval. Everything that was done was to enhance the member experience. For example, we completely re-designed our website for improved user experience. As a result however, moving the Resource Centre (which was successful at the start on Google Drive) was delayed.

I did not realize how many moving parts there were within CABS to carry out the vision and strategic direction with a team so member-value focused. Calvin hired two directors to work on ad hoc projects to support both the Member Program and Conferences deliverables, and we still found ourselves needing to prioritize and make decisions on what to put on the "to do... later" list. While I feel that there is a good foundation within the member portfolio, there are plenty of ways CABS can make improvements for the benefit of the members.

Below I have listed the notable statistics from the portfolio, successes from this fiscal year, challenges, and recommendations.

Members and Alumni Relations Portfolio by Numbers

- 45 Hours of Member Calls
- 3 New Member Applications
- 2 New members
- 8 Updated job descriptions
- 3 Webinars
- 25+ Member Profiles Created

Successes

Member Communication

From the beginning of my mandate, my priority was to work directly with presidents as our Board of Directors and leaders of the BSAs in our membership. Throughout the past year, I focused on communicating with the BoD to provide support and insight at their convenience, while conducting check-ins to understand how CABS' offerings could benefit their initiatives and efforts at their home university. My approach was to keep members informed through email (timely responses, summaries of action items, reminders about deliverables) and the designated member Facebook groups while emphasizing to the Board that members could reach out to us to give feedback and ask questions at any time.

New Members

We are very proud to welcome Western University as Class A members and University of Toronto Scarborough as Class B members as of CBSC 2015! I had the pleasure of coordinating with Chanelle and Carol to prepare their letter of intent and presentation for approval at the August Board of Directors Meeting. The knowledge sharing that will come out of this new addition will have a positive impact across current member BSAs, and the CABS network will be strengthened by more growth and development within the circuit.

University of Toronto Rotman is also interested in Class B membership with CABS, which is contingent on Board approval of their application documents at Roundtable 2016.

Other schools that I connected with over the term include:

- St. Mary's University

- Will be applying for membership during a F2017 summer event)
- University of Windsor and University of Guelph-Humber
 - Have connections to get in touch with again during F2017 when new executive team can make the final decision
- Mount Royal University and British Columbia Institute of Technology (BCIT)
 - Expressed interest in membership but do not have an overarching business student association - resources were provided to both schools and I will work directly with BCIT after my mandate to provide information on how to initiate a BSA for future CABS membership
- University of Prince Edward Island (UPEI)
 - Opportunity exists to expand our membership even further in the F2017 term

This interest in CABS membership speaks to the caliber of the network and what it means to be a CABS member school.

Member Accreditation

I played a supporting role in the creation of the Member Accreditation Standards Program this year, working with Simon, Calvin, and Zac to create the documents and communication strategy. Leading up to CBSC, where the program was approved, I organized Q&A “office hours” for the BoD to ask questions and we sent out multiple communications following the approval of the program to socialize it and further respond to feedback. Over the last few months, more enhancements have been made to update the program guide and policy to accommodate insight from the Accreditation Committee.

Challenges

Member Outreach

I would encourage individuals who take on this role to provide multiple opportunities to connect with the presidents and executive members throughout the year. The outreach that was so important to me at the start of my mandate was lost as program creation and other administration efforts within the Management Team took precedence. The balance that I thought I had mastered from my previous involvement roles was not enough, and I struggled with maintaining contact this term with all the presidents individually. At both the president and executive level, there is great value and importance to keeping up with all of our members on a professional and personal basis to build and maintain the relationships that we are lucky enough to have through this amazing network. I recommend that the check-in process throughout the semesters continues, but more emphasis is put on proactive outreach throughout the year to touch base and create an environment for open sharing and communication.

Formal Celebration of Member Success

Given the scope of our operations this year, one well-intentioned initiative that was not delivered upon was a strategy for publicly celebrating member milestones and new initiatives throughout the year. I felt like I had all this useful insight from individual phone calls with each member - I had all the goals and best intentions from each team and could track your progress and gush about seeing your ideas come to life throughout the term or become great lessons for next time.

I planned to work with Cody on a marketing initiative to encourage you to nominate each other's successes throughout the year so that I could create highlight documents or "case studies" to feature. The intention was to give your successes national exposure, but I wasn't able to track your initiatives and create these highlights. I strongly recommend that the next person in this role takes the time to talk with each of you like I did, and follow through with the creation of at least 5 highlighted schools throughout the year. Really great way to make everyone feel good and share the #cabslove!

Further Development

In addition to the recommendations made above, the following are key areas of continued development for future individuals in this role to work towards:

- More webinars (archive the mentorship & elections webinars and survey for more ideas)
- Uploading resource centre onto the website
- Staying connected with prospective members
- More active outreach to alumni now that we have a database to use
- Celebrate member successes more formally (marketing initiatives, awards, etc.)

Marketing *(Written By Cody Mackay)*

Overview

At the onset of my term as VP Marketing, I set my sights on four key areas of the portfolio that needed improvement and focus:

1. Establishing a focused PR strategy & forging new media relationships
2. Developing new ways to showcase our member societies and encourage inter-member collaboration
3. Expanding CABS Membership by supporting the VP Members with promotional materials
4. Enriching the CABS web & social media experiences

As my term progressed, it quickly became evident that the Marketing portfolio had been in a state of disarray and neglect, with the position having effectively been empty for more than a year. Furthermore, with the exception of one or two of my predecessors, the CABS Marketing portfolio has arguably never been developed to near the potential level it could be at. This realization quickly led to re-prioritization of platform objectives and presented many challenges that I had certainly not expected to encounter. It quickly became obvious that simply maintaining the CABS Marketing portfolio at the level of operational excellence I had anticipated would be nearly impossible on my own. To do this while at the same time expanding the portfolio to include new initiatives and activities was simply out of scope of my one year term.

In spite of these notable difficulties, there were many marketing successes throughout the year which I will highlight in more detail in the sections below. Countless hours were spent building and designing new marketing materials for our events, which are now saved in templated format so that future years don't need to reinvent the wheel every time an event takes place. We

designed standardized logos for each of our annual events, and built custom unique graphic identities for each of the new CABS Programs that our team launched throughout the year. Focus was placed on releasing high-quality social media content over high frequency posting, and most notably we received a record degree of positive engagement on our “Meet the Board of Directors” social media campaign.

Marketing Portfolio by Numbers

- 686 New Facebook followers
- 46% Annual social media followership growth
- 5 Successful social media campaigns
- 11 New program and event logos
- 1200+ Customized Delegate Tags
- 13,000+ Organic post reach record
- 4 Event promotional packages
- 8 Event materials templates produced
- 10+ Website resource tables created

Successes

CABS Event & Program Branding

In the past, each edition of our events would have a unique logo designed from scratch by the relative organizing committees. While it is nice that each host was able to inject a taste of their own flair into the event’s branding, it also introduced risk of inconsistency and poor quality. In response, I set out this year to develop a standardized logo for each of our annual events that can remain the same YoY, with a mere adjustment to a text element for the corresponding host location. This also ties into the templating of both general marketing materials and customized delegate materials, again reducing the risk of inconsistency and low quality from year to year. Additionally, each of the CABS Programs introduced this year has a unique and CABS-branded program logo, which added legitimacy to the programs when presented to both external and internal audiences.

CABS Promotional Materials

The production of promotional packages for JDC Central, CABS Roundtable, CABS WCLR & ECLR, and CABS CBSC was a big step in filling the current gaps in organizational documentation. These packages were designed with the intent to make them as timeless as possible, so future years should be able to mostly recycle them without updating the content for the given year. They have already proved useful to a variety of audiences, including event delegates, program teams, prospective event bidders, prospective members, external groups, and prospective partners. In regards to their content, I would like to thank Calvin Parker for developing all written materials for the conferences packages and Rose-Lyne Boghos for the JDC Central package.

CABS Social Media Channels

Although still not fully deployed, compared to years previous the state of CABS' social media presence has changed drastically over the course of the year. Once stagnant for many weeks on end, and with low engagement and followership, our Facebook channel now benefits from frequent posting of quality and engaging content, and has a track record of consistent and significant follower growth. In the past 3 months, the CABS Twitter and LinkedIn channels have started to be utilized more frequently as well, with satisfactory results.

Challenges

CABS Media Relations

I had high hopes at the beginning of my term to showcase what CABS had to offer to a much wider audience by leveraging media relationships and publicizing CABS through video content and partnerships. However, this was typically something that ended up falling on the back burner in the constant flurry of event preparation. When it came to leveraging existing media relationships, I realized that we really didn't have any, and it is not an area I have very much experience with. I also faced the challenge of painting a positive brush on the organization to the public when things weren't always "business as usual".

Centralization of Event Marketing at the Head Office Level

While I certainly understand and respect the intention of centralizing the marketing function for each of our events at the head office level for consistency and quality control, it created some significant and unexpected challenges for us. With many of our events, marketing was always left until it was too late in the game, causing undue stress and headaches as we tried to rush to execute. These frequent periods of hyper-focus on our events, combined with the high-level organizational deliverable timelines at each, often led to derailment of other important activities within the marketing portfolio during each of these events.

CABS Website

The CABS Website was undoubtedly the biggest challenge I personally faced during my entire term. Even for myself, with ample web development experience, as well as Adam Normand and Calvin Parker, the website re-design project proved much too large for us to fully complete in a single term. It was a source of one of my biggest frustrations and stresses, largely due to lack of control on my part in the process of switching from the original website theme to a new theme in Q1. I regret not stepping in and reining in the development process before it got out of control and we were suddenly left without a functional web presence for the majority of my term. Much of this downtime was due to the use of a theme that didn't suit our needs, and frequent unexpected technical issues. Finally, in late Q3 Adam and Calvin were able to locate a much more suitable website theme which solved many of our technical difficulties, and they were also able to take over the project so I could re-focus on the marketing portfolio.

Further Development

Even though this year was a year of building and development, the next year will need to continue to do much more of the same before the Marketing portfolio is able to stabilize. To reach such a position of stability, the marketing portfolio will absolutely need to employ assistance from talent outside of the direct CABS circuit, as it is evident that there is a lack of interest and necessary skills from within the CABS network to draw upon for portfolio team members. Given the large member base we serve, and the nature of our operations being mainly digital, it is absolutely unsustainable for the marketing of all of CABS's head office initiatives and centralized events to be managed and executed upon my the VP Marketing alone. Employing the experience of dedicated individuals trained in media relations will be critical in building on the minimal regional media connections that were forged this year and rekindling relationships from the past. With the growth of the CABS social media channels, I would recommend that my predecessor locate a dedicated community manager to focus on the day-to-day execution of content creation & engagement. Additionally, it would be wise to re-evaluate the current ultimate position of responsibility for the CABS website falling under the VP Marketing's oversight, given the shift from a static website to a dynamic informational portal with significant IT infrastructure and complexity beyond what most marketing students have experience with.

Corporate Relations *(Written By Zac Hogg)*

Overview

I took on the Corporate portfolio this year, similar to External in that it was our vacant position, but really with a specific focus to better my future client development skills (specifically for accounting, moving up on the ladder is client management related as much as it is technical competence related), along with continuing to offer great value to future students. I personally wanted to ensure that these events continued while also adding a Waterloo flavour to our circuit: professional development through navigating

Corporate Relations Portfolio by Numbers

- \$125,000 Worth of Contributions raised by our Fiscal 2016 Partners
- 44 Individual Partnerships through our 5 Flagship Events
- Double Digit Growth in JDCC Partnership Contributions
- Triple Digit Growth in Summer Event Partnership Contributions
- 30 New Partnerships (16 In-Kind, 14 Dollar Related)
- New Nationally Streamlined Process
- Forward looking: continue strong experiential learning and career development integration

Successes

Throughout this year, I had provided ample focus on bringing in numerous partnerships, regardless of size, to all of our flagship events. In years past, focus was primarily placed on our

two national events, however, I wanted to provide ample focus on all of our flagship events. We brought in 44 partnerships at our 5 flagship events as follows:

- RT16: 6 Partners
- JDCC16: 16 Partners
- CBSC15: 11 Partners
- ECLR15: 3 Partners
- WCLR15: 8 Partners

Similar to our National Executive Development Program, by incorporating many different partners across our offerings, we can contribute substantial value over a full year to many different students in our circuit to developing as professionals through many different avenues. For example, at JDCC this year, we had an amazing keynote speaker in Hamoon Ekhtiari present to 800+ students, receiving a standing ovation from all. We additionally incorporated on-site mock interviews, providing on the spot interviews for over 50 competitors at this year's competition. It's the partner value adds like these that substantially contribute to the experiential learning and career development opportunities of the students in our circuit. At the end of the day, that's what the purpose of the circuit and CABS is: how can we make you better.

We were able to execute on a number of various partnership goals, achieving (or substantially achieving) our target on the following events:

- WCLR: 89% of \$10,000 goal
- ECLR: 113% of \$5,000 goal
- CBSC: 92% of \$5,000 goal
- JDCC: 95% of \$100,000 goal

We also added head office directors to our Corporate resources this year, which allowed us to connect with partners between events changing cities from year to year. Our Western director has been able to line us up with great leads for WCLR 2016 and our Central director has been able to approach a number of leads for various upcoming events. Between myself, my head office and program directors, we tapped into hundreds of leads this year, and this will allow us to plan out the best companies to reach out to for the upcoming fiscal period.

Overall, we eclipsed 82% of our goal across the board this year, on a relative average amount of goal achieved per event, and raising \$125,000 brought us to nearly 75% of our nation-wide goal of \$170,000 of partnership value (when consolidating all 5 events on an absolute scale). We will continue to leverage CBSC as a loss-leader in the upcoming year to bring us in more leads to potentially add more corporate dollars to achieve this overall goal in the upcoming year.

Challenges

Over the past year, I would have liked to improved the following scenarios:

- Not effectively managing a few of the program teams
- Not having corporate directors on a few program teams

- Starting partnership process too late for some offerings
- Minimal sponsorship coverage of JDCC cases
- Poor results for RT sponsorship

I believe that with a full year of experience and only managing the corporate portfolio, that we can create some efficiencies in how the program teams are nationally managed, and have some more success with retaining corporate directors on program teams. An improvement will be the upfront resources I have already created for the Fiscal 2017 offerings and the leads I will now be able to provide to our program teams right off the hop. I was held back by my lack of experience and depth of knowledge of the portfolio and I'm happy with what we have stocked in the cupboard this year

Year over Year Comparisons - Summarized Tranches of CABS Roundtable Monetary Support:

Tranches	2012	2013	2014	2015	2016
School	\$15,000	\$0	\$15,000	\$0	\$0
Commerce Society	\$0	\$5,000	\$20,000	\$2,000	\$0
CABS	\$20,000	\$28,000	\$37,000	\$0	\$4,000
OC/Program Team	\$25,000	\$29,500	\$7,800	\$7,500	\$1,500
Total	\$60,000	\$62,500	\$79,800	\$9,500	\$5,500

As can be seen in our year over year analysis, CABS has only been typically responsible for signing one or two partners for CABS Roundtable. In year's past, this was typically maintaining the two main event sponsors, CPA (CGA) Ontario and PwC. However, due to a similar issue of schools declining to attend RT15 in event projections and the fallout of poor Asper delegate (the Asper BoD representative) behaviour in front of these sponsors, these deals were lost two years ago. I have begun talks with CPA Ontario on how we can structure a piecemeal agreement where each province will pay \$1,000 to \$2,000 to get CPA involved in this event on a regular basis, as opposed to soliciting sponsorship to the new regional jurisdiction each time Roundtable changes schools. With that and a re-tooled focus to sign our JDCC partners once CABS F2017 operations have been confirmed to move ahead, plus a fully staffed program team for RT17 already (and already having been given the tools to execute their mandate), and with a new lengthy set of leads, I believe this event is salvageable. However, I present this information to show you how far off a cliff RT has fallen, from poor sponsorship benefits in 2013, to poor delegate actions in 2014, to no delegate or local school support in 2015 and now similar circumstances in 2016 (but-for the huge macroeconomic issues concerning the Calgary region), this event has been in a state of concern for longer than my time in CABS (Waterloo entered the fold in the summer of 2013). Furthermore, to have CABS to operate next year, to have a fully staffed management team, to have JDCC run, to have the smaller events run, to have JDC National be formed, to have some confidence in Roundtable - we need your confidence. I believe it exists and I believe in this circuit. If CABS continues into the upcoming year I have volunteered myself for this role again, as I want to capitalize on everything I learned this year

and leave this in a better place. My work here is not done. I want to have ten staple partners for Roundtable signed on this summer, and bring this event back to its former glory.

Further Development

Over the next year, I am happy to continue to contribute in this role and take what I have learned to further expand our partnerships to leave this portfolio in a good spot. Our main goal will be to strengthen the partnerships at our main events, signing on JDCC partners after a guarantee that CABS will operate next year, and then putting substantial effort into ensuring that Roundtable has a strong set of partners before the end of this summer. I would like to have over 20 partners at JDCC 2017 and roughly 10 staple partners at Roundtable 2017. My other focus will be to get a long-term partner for ECLR; this will be the primary focus of the Central region head office director over the next couple months, tapping into new leads we have in the Eastern region from our corporate push over the past few months. My colleagues, even the exec team, have provided us a number of new avenues and directions to go in for new partnerships this upcoming year and I have high hopes for the future of this portfolio.

External *(Written By Zac Hogg)*

Overview

As VP External this year I tried to help out our other portfolios as I had two roles and my colleagues were really building out our CABS Initiatives across the board. With my dual role, I tried to help my colleagues on the following areas:

- Accreditation Program structure
- Awards Program structure
- Securing bids for our F2017 flagship events
- National Discounts program (moved to Corporate portfolio)
- Media Relationships

I personally enjoyed the work of the dual role in that I was able to supplement my weaker points with valuable contribution and initiative to help my other teammates achieve their goals. I also enjoyed the strategic side of bringing forth a number of ideas to various stakeholders.

External Portfolio by Numbers

- 1 Eastern competition proposal (shot down by a member society)
- 1 National competition proposal (new being heard by a member society, REFAEC interest, JDCW Chair previously shot down)
- 1 Canadian PSE Business Education research partnership (lacklustre member support)
- 1 Financial leadership event proposal (heard by various stakeholders for CABS strategy)
- 1 National Executive Development Program (previously Core5)
- 1 Multi-million dollar community initiative acquired (5 Days for the Homeless)
- 1 Ontario Regional Deans meeting proposal with Ontario BDS and JDCC (for future)
- 1 Canadian Deans meeting proposal for future connectivity with CABS and CGBSD

Successes

National Executive Development Program

Over the course of the year, I had the pleasure of working with my colleagues on seeing through a year long curriculum that will show its full force at CABS Roundtable. I would like to thank the Interim VP Conferences and his Director of Conferences for executing the culmination of this approach at our upcoming CABS Roundtable 2016 in Calgary. Overall, we have executed an approach where:

- Incomings at Roundtable are at the Ready to Learn Stage,
- Execs at E/WCLR are at the Ready to Plan Stage,
- Execs at CBSC are at the Ready to Execute Stage,
- Execs at NBSC are at the Ready to Collaborate Stage, and
- Outgoings at Roundtable are the Ready to Transition Stage

This approach allows us to have some planning continuity and really drive home a value for the students through these sessions. Of course, we will continue to ensure a strong balance between “lecture/workshop” and what I like to call open “breakout session” time at our upcoming events. Both styles of workshops and breakout sessions should look to complement one another, maximizing the effect of different types of sessions. We have just confirmed our session lineups and schedules already for ECLR and WCLR so I’m excited to see the Interim VP Conferences, the successor, and the program teams execute on bringing a lot of value through these sessions and this year long program at our upcoming events.

5 Days for the Homeless Acquisition

After months of a back and forth on the true logistics and potential legalities, our team moved ahead on a swift takeover strategy of the 5 Days for the Homeless initiative. We communicated with various leaders of the 5 Days for the Homeless initiative over the end of the fall and then went to our stakeholders formally in January to get their support of a takeover. The current 5 Days team who have been overseeing the initiative for the past five years were very open to this change and look forward to CABS taking over the initiative.

During this transition time, our team will be executing the following:

- emailing schools to ensure they sign up for this March’s campaign
- marketing the March 2016 campaign via our national reach
- onboarding a new program team overseen by CABS

The 5 Days initiative will become an inclusion to some of our other programs, like the National Executive Development Program, where we will have a few sessions with some time dedicated to this new initiative to ensure our members are up and running with the necessary information throughout the year, which was the major sticking point in CABS taking it over. We thank the members for their time and support in their help in taking over this initiative.

Challenges

Overall, I did not put as much time into this side of my Corporate & External portfolio as I would have liked to. That led to a few things I will end the year not content with:

- No real ground work on a JDC Atlantic (solid proposal in place)
- No real ground work on a JDC National (adequate proposal in place)
- Very few members getting involved with the Conference Board of Canada study
- Slow traction for media (Globe and Mail connection struck in early February)

I think that with a full time dedicated executive to solely this role, that we can have increased communication with the CFBSD, REFAEC, JDCW, the Eastern members, and continue to leverage the network we have to continue to grow our offerings for our members. Furthermore, a dedicated executive to this role can allow us to begin advocating on more important business student needs as the Conference Board of Canada research study wraps up this fall and have a more direct channel to the CFBSD and government on relevant student issues. We also have an article in the works with Globe and Mail discussing the value of partnering our events and finding new candidates; we will look to strengthen this with advocacy related articles and issues faced by our members in the upcoming year.

Further Development

To close, I think this portfolio can continue to move forward should it have someone staffed on it for a full time basis. It would be great to have someone with some advocacy experience that can also do some strategic work in business (new member) and operations (new event) development to support our other portfolios by leveraging the connections of the circuit. If we do not have a successor for this portfolio, I will also be sure to continue to leverage our new Globe and Mail relationship with the Marketing portfolio to continue the promotion of our offerings to a large, national audience. We will also continue to look into our leads and finalize legal counsel through Juripop and pass along these services to a more relevant portfolio like the Chair of the potential new board structure and/or the President.

Conferences *(Written By Calvin Parker)*

Overview

With the flagship events being the most important tangible and significant offering of CABS, their continued improvement, sustainability, and viability to differing member needs is of utmost importance to their organization. Overall, the three summer events, considering the little planning or structure they had together from the last fiscal year due to their late bids, were widely received. Each event was financially viable, served to connect our member executives with knowledge and experienced alumni for moderated discussions and lectures, and provided attendees with valuable takeaways. While logistics and execution, especially for CBSC, could have been improved, they were a definite step forward for the organization.

While event quality saw positive development, mostly around programming, there was limited development in other areas for the portfolio, which much of the earlier focus on operations

entirely. A Management Team structural change brought me into handling both Conferences and the President portfolio; while this effectively split my efforts, I focused more on developing better structure and processes, a theme of my work, into our events. With the majority of my investment into creating administrative systems for Program Teams happening last year, in terms of centralized accounts, document storage, and template use, I was able to enforce compliance with these new program teams whenever instructions weren't already given to the contrary by previous executives. With the fiscal 2017 summer events, I am to continue along this trajectory, with more emphasis on higher level management for the CABS Management Team, including reporting standards and project plans for each event, while continuing to refine templates and processes as I develop them further.

Conferences Portfolio by Numbers

- 4 Executed Events
- 4 Flagship Event Bids for F2017
- 5+ Operational Templates
- 1 Reporting Template
- 4 event promotional packages

Successes

The main success of the Conferences portfolio has and will continue to be the National Executive Development Program that will come into full force at CABS Roundtable. The member data collection and dedication of the Program Teams and Management Team have enabled this program to come to life - CABS' offerings are more relevant, timely, and proactive to anticipating the most important topics for executives to learn. Discussions and similar-school sessions are based on actual statistics and intensive research, and lectures use a combination of year-over-year feedback and in-year direction. It's a dynamic model that does require maintenance, but will deliver exponentially superior results if grown.

Throughout the year, I also created continued on my initiative from last year by growing the Conferences Promotional Packages into individual Conference Promotional Guides, which served to complement the corporate outreach initiatives and provide a standardized way of presenting key content about our flagship events.

Finally, I continue to develop templates for delegate material, budgets, and logistical processes that will all be accompanied by procedural documents, along with administrative standards. When I started with CABS, Program Teams, then Organizing Committees, were completely separated operational from CABS and had to build all of their required material from scratch, and were also responsible for their own applications solutions. Now, standardized accounts and positions with communication history, retained documents in a year-over-year cloud-based folder structure, and tools and templates for most any function provide an excellent resource base for these teams. Combined with programming, the execution of these events will become fairly automated.

Challenges

Turnover with directors and the Vice President throughout the year made it difficult to maintain a

level of consistency across the portfolio. In most cases, the Management Team had to become heavily involved in the day-to-day operations and planning for the conferences, which took away from the strategic direction that the executives intended to pursue to make the CABS offerings more meaningful. As we propose Governance changes and continue creating reusable templates for execution of these events, Program Teams should be able to move forward with more accountability and direction for the events that they are in charge of and the Management Team can oversee rather than be directly pulled into the operations.

Further Development

CABS Conferences should aim to set the standard for quality and value in undergraduate business events, with more time dedicated to media, marketing, and general awareness. Actively promoting the learning, networking, and professional development opportunities at these events will help maintain and grow stakeholder buy-in, and ensure growing partnership, attendance, and therefore additional value for all involved. Continuing to develop and maintain an effective programming model while concentrating on these external-facing aspects of the events will help achieve this vision.

Further, an annual review of each event, its role in the overall curriculum, and its current value will help CABS decide if its offerings need to be adjusted or changed. Outside of these conferences, I see potential for CABS to be hosting alumni banquets in cities with high alumni concentrations. This could be an opportunity for circuit members to engage with more CABS partners, current executives, and further build their networks and locate new opportunities. It could also be another source of revenue for CABS. Strategic initiatives such as these should become more the focus of the executive portfolio, with operations of existing events levied completely onto the Program Teams.