

# Management Team August 2015 Update

## Fiscal 2016

Delivered to the Board of Directors of  
The Canadian Association of Business Students  
On September 14<sup>th</sup>, 2015

## President

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### Portfolio Update

The beginning of this month was focused on preparing the deliverables needed for CBSC and, to that effect, supporting the team where necessary in relation to the event. Additionally, I finished up my final semester at the University of Victoria on July 30th, and moved to Calgary to return to work on the 4th of August - it was a very busy period, and it limited the amount of time I was able to spend on CABS in the interim.

Shortly after CBSC, we hired Jenna Pilgrim, who served as VP Communications for the Trent Business Students' Association during fiscal 2014, as our Executive Secretary. Jenna brings a diverse set of skills to our team, and her assistance will do much to alleviate my administrative burden so I can direct my resources to where they are needed most. Jenna will also be assisting on many projects - essentially, she will serve as an extension of the management team. She is very talented, and a great addition to CABS. You were made aware of her hiring through the Memorandums I sent out, which included our other appointments.

The most recent weeks and the later half of August have been dedicated almost exclusively to the completion of our website. I apologize for the continued delays in its launch - with something so complex, it's difficult to provide an accurate project timeline. As previously communicated, this deliverable will be much more than the average promotional site - we are working to install many user features to support more collaboration and learning for our members, including a forum, file download tool, webinar access, and payment processing for our events. All of the structure is complex and consuming to build, but the results will more than outweigh the investment. We did have a fairly large technical issue come up, which we are working through, at which point I can update the membership with an anticipated launch date.

Moving forward, I am setting up mid-term reviews with the management team for September to take stock of past successes, future goals, and areas for improvement, in an attempt to continually align our focus and direction. I am also preparing to work with the Governance Committee to build the Governance Development Plan, a deliverable for my portfolio as dictated in the action plan. As the site surpasses construction and enters maintenance mode, I will again be focusing on long-term strategy, governance, and general assistance in each portfolio to strive toward the greater goals of the organization.

If you have any questions or concerns about my progress, please do not hesitate to reach out.

Sincerely,

**Calvin Parker**  
President

## Vice President Finance

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### Portfolio Update

For the month of August, I worked to provide payments to conference vendors, following up on receivables, and managing post-conference duties. This included reimbursement of expenses incurred by conference OC and CABS executives alike. All immediate payables have been addressed and only require fulfillment of delegate invoices to settle events.

I am delighted to be joined by the talented and knowledgeable, Jean-Philippe (JP) Allen - Former VP Finance for Bishop's University Commerce Society, as my Director of Finance. JP will be assisting me with the operational duties, allowing me to focus on more strategic initiatives, while maintaining high operational standards.

Lastly, I worked with the CABS executive team to begin subsequent steps for the recently approved CABS Accreditation Program. Our work has been on including the valuable feedback we received from our esteemed Board of Directors to ensure that this program is able to serve them to the best of our abilities.

In the coming months, prior to NBSC, I look forward to tackling more operational duties and advancing the CABS Accreditation Program for your consideration. Please do not hesitate to reach out and say hello or share a picture of your cat with me.

Sincerely,

**Simon Bullock**  
Vice President Finance

## Vice President Corporate/Vice President External

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### Portfolio Updates

My time during the course of August was focused on CBSC and JDCC. Over the first part of August, I was connecting with our largest JDCC partners on their feedback from 2015 and wants for the JDCC 2016 event. Additionally, I took on a significant role in leading the CBSC event, overseeing the professional development components of the event, such as the workshops, speakers, and networking session - the Financial District Conversations & Connections event on Friday late afternoon. We also saw our first alumni inclusive conference event which is a trend that I hope continues as it, in addition to the alumni we've been lining up as speakers, has already begun to result additional event sponsorships.

Leading the curriculum work of our circuit, and based on the feedback we have gotten so far, we are looking to meet with the eventual RT, ECLR (WCLR), and CBSC OC's to move the strategic planning workshop from CBSC to RT (incoming curriculum), moving the CPAO partnerships workshop from CBSC to ECLR (for both president and corporates), and have created a first draft of incoming position specific workshops for RT, as opposed to a generic set. We are also looking to re-install a case simulation component for Roundtable not only for incoming executives, but incoming, and continuing executives too. It is my belief that by continuing to add more professional development components to our events, that we will bring in more opportunities for our partners.

Additionally, over the upcoming month, I am looking ahead on structuring some director positions job roles to work under the head office out of a few different regions, namely: GTA, East/Ontario, Central, and West. Now being in Ottawa, I will also look a bit more into lobbying with the CFBSD and some levels of government. We will also get a formal update out to President and VP Marketing on the Staples-CABS BDP (discount program).

Below is a summary of objectives from my campaign. It is not a completely exhaustive list, and some of the metrics are inclusive of the entire summer, as an appropriate report back on progress thus far, as this is our first monthly report. This comprises the corporate portfolio as I have not progressed too far on any specific external portfolio targets laid out at the beginning of the year.

Sincerely,

**Zac Hogg**  
Vice President External  
Vice President Corporate

## Vice President Marketing

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### Portfolio Update

Under the Marketing portfolio, the beginning of August was essentially consumed by the completion of marketing deliverables for CBSC, including communications, print materials, signage, etc. Since then, I have been committed to working extensively with Calvin and Adam in finishing the work underway on the CABS website to ensure it meets timely completion.

This month, I've been joined by Dan Park, who is likely a familiar face to many of you due to his role as the VP Marketing for the University of Alberta's Business Student Association. Dan will be working as our Head Office director of Marketing, sharing his expertise in graphic design, website development, and much more. He will be an invaluable asset in the transformation of the CABS brand and marketing presence to the level it should be at.

I have been working with the JDC Central Organizing Committee to ensure that their marketing needs will be adequately met, and in light of discussions, we decided that pure centralization of marketing for such a large event isn't reasonable. As a result, I assisted the OC in sourcing a dedicated Director of Marketing, Tyler Grieve of Trent University, to meet this need.

In the coming month, my major focuses will be on continuing website development, revitalizing underutilized social media channels, and designing/redesigning new and existing internal and external marketing resources. As always, I will also be providing ad-hoc marketing support for the rest of the team where necessary.

Sincerely,

**Cody MacKay**  
Vice President Marketing

## Vice President Member Relations

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### Portfolio Update

#### Post CBSC Work

- Following CBSC, I completed post-conference deliverables for members; such as reviewing and formatting our BOD Meeting Minutes, organizing the Head Office and BoD folder with regards to meeting follow-up documents, and sending out follow ups to all presidents. From Zac's outreach to speakers post-CBSC, I now have more information about which discussion topics were of interest, and which we will use to improve and update our curriculum for Roundtable and future conferences.
- Our team has more work to do for the Accreditation Standards Program following the feedback from the BOD, and we have mapped out changes and refinements that need to be made. In addition to ensuring that all our governance documents are updated and the program process is clear, we will be creating a program page on the website and more presentation material in time to put together the Special Projects Committee at NBSC.

#### Website Content and Member Services

- In terms of services, I am continuing to organize the Resource Centre Drive and categorize the available material, so that these can more easily be featured and searched once the website is launched in September. I am also scheduling a webinar series featuring elections best practices in anticipation of NBSC. This, in addition to improving communication of the availability of other CABS benefits such as partnerships/discounts, is to benefit our membership as a whole.
- My priority is to work directly with presidents as our BoD and leaders of the BSAs in our membership. Through communicating with our BoD and providing support and insight at their convenience, I am able to support their initiatives and efforts to benefit their own BSAs. As such, I am conducting one-on-one check-ins with 30+ presidents for a second time during my term and have made it clear that at any time members can reach out to me.

#### Member Outreach

- I am very proud of our two newest member schools and will continue to do outreach to St. Mary's University and the University of Toronto Rotman School, who intend to apply for membership in the next year. I will also continue communication with Mount Royal University, as they would like to learn more about BSA practices and creation in order to be a member of CABS in the future.

Sincerely,

**Jessica Gutierrez**  
Vice President Member Relations

## Vice President Conferences

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### Portfolio Update

Since running our third event of the year at CBSC in Toronto, I've taken some time to look at the processes and full package we are offering our delegates. Before long, we will be back together as entire teams, transitioning with fear and excitement!

In moving forward with three conferences under my belt, I am pulling together all of the documents we have used, best and worst practices, and using what we've learned to create easy processes for our RT OC as well as future OCs.

The conferences calendar is a project to give our members the information they need, to get their students out into other environments and network with fellow student leaders. The bulk of this project is to be completed by September 15, and can be ongoing as conferences and details become more readily available.

Sincerely,

**Jeanna Kozan**  
Vice President Conferences

## Vice President Competitions

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### Portfolio Update

Since seeing you all at CBSC, I have spent the last two weeks of August focusing my attention on these two particular areas: Assisting the JDCC OC in their daily operations and updating the competitions calendar.

- Assisting the JDCC OC: I have continued to maintain weekly meetings with the Executive directors to monitor the progress of the competition. I also ensure that the newly appointed directors have all the necessary resources to get started on their mandate. Moving forward, I will continue to provide support to the OC as needed and help them in the planning of the November captains meeting.
- Competition calendar: I have reviewed the past calendar and noted the recurrent competitions. I will continue working on updating the competitions by reaching out to BoD members and chairs of competitions Organizing Committees. I intend to have the list updated by September 15th.

Sincerely,

**Rose-Lyne Boghos**  
Vice President Competitions