

# Management Team Quarterly Update

## Quarter 2 Fiscal 2016

Delivered to the Board of Directors of  
The Canadian Association of Business Students  
On August 15<sup>th</sup>, 2015

## PRESIDENT

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### Portfolio Updates

Hello members!

This summer has been a busy one so far, but it's always worth it – and we are looking forward to seeing our beloved BOD at CBSC in less than a month!

Our general focus in CABS since the beginning of our term has been a mixture of strategic and operational initiatives, with an emphasis on the later. With short timelines on bids for both CBSC 2015 and ECLR 2015, it required a lot of resources and energy to ensure both events could be a success. With many of our portfolios directly evolved in our flagship properties, it took effort...

As the only second-year executive on the team, I have spent much time onboarding and coaching the other management team members. What they know now about CABS, took me all year to learn last year. I believe without reservation this is the most equipped CABS team yet!

- Continually developing and refining CABS' internal systems, including administrative and database resources, to ensure efficient performance and sustainable operations
- Completed detailed administrative changes to the JDCC Google Apps account, which was transferred to the Director of IT
- Met with members on an ad-hoc basis to discuss different initiatives and resources
- Began work with the strategic and governance committees
- Developed a strategic plan, action plan and related system to ensure continuity and stability in CABS' direction
- Continually working on the website along with Cody Mackay and Adam Normand
- Worked with the team to develop the Member Accreditation system
- Revised the Conferences and Competitions Policy
- Generally assisting the team with any and all initiatives

Sincerely,

**Calvin Parker**  
President

## Vice President Finance

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### Portfolio Updates

The finance portfolio over the summer months has been a blend of operational tasks, strategic initiatives, and administrative clean up.

Strategic speaking, I have been working tirelessly (no tires falling off this rig) to develop new programs that meet our member's needs, while tying them into our financials. On the operational front, our steady flow of conferences has provided an ample workload to manage and oversee in the form of invoicing, budgeting, contracts, models - oh my! On the Administrative back-end, I have been working to increase congruency amongst our policy, terms of references, and bylaws. Further details are listed below:

- Mapped out and modelled a new accreditation program to help better understand our members, their needs, create new value, and a construct a financially equitable membership structure to satisfy our diverse and impressive membership
- Created new budgeting templates to assist our OCs and add clarity in forecasting for events. New budgets work off of a quadrant matrix for multiple scenarios and help forecast events.
- Invoices - lots of invoices - sorry about that. #notsorry
- Modelled new bi-variate membership fee structure to be more inclusive of our range of members and the value they receive from CABS.
- Create committee Terms of Reference for better administration, formatted aged documents for that administrative patina
- Tidying up backend accounting software accounts (#gross) for prettier year end reports (#Woo)
- Signing authority hand over, banking, and corporate directorship accuracy - even more boring than it sounds.

Sincerely,

**Simon Bullock**  
Executive Vice President Finance,  
Chief Financial Officer

## Vice President Corporate Relations

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### Portfolio Updates

With respect to the Corporate portfolio, the summer has been focused on ensuring the needs of all conferences have been met. I have been trying to formulate some smaller level ideas that will help a future VP transition into what is always a tough summer, including putting forward contract offers for title sponsorship of the regional leadership retreats, and identifying how director positions to the head office could function to help the corporate portfolio. From now until CBSC, the focus will be split between (any VP External work and) finalizing the professional development lineup at said August event, and continuing to strategize partnerships with returning JDCC partners.

For the External portfolio, I have been focused on understanding how we can branch out our reach in some key areas that will directly benefit our members. The main focus of which is lobbying, I've been trying to coordinate with the Canadian Alliance of Student Associations to better understand how the organization can lobby on educational matters directly to Parliament Hill. I have also used this dual role as a means of building special projects like the CABS (Core5) Educational Curriculum, and exploring new conference and competition opportunities.

Here's a somewhat exhaustive list of what I've worked on during the summer and/or will be working on for the next few months:

- Built standard form CPP's for the summer events; the members have access to this via our Resource Centre on the CABS Drive
- Led the strategy of how corporate partnerships will be sought and focused at the lineups and schedules for events to ensure that we can offer good professional development opportunities for delegates and thus strong partnership opportunities for partners; there have been small steps made on this account for CBSC which will hopefully result in some noticeable differences from the August instalment in our portfolio in recent years, with it coming to full fruition to bettering the PD experience at JDCC, and finally being fully eclipsed at Roundtable in Calgary as we deliver our outgoing executive curriculum for the first time
- As briefly mentioned above, I have, in my joint External and Corporate role, been working to ensure we offer a high value educational curriculum throughout the year; as we move through the year, the goal is to balance education with peer to peer learning via the original breakout sessions everyone knows and loves - offering this curriculum is to ensure we can deliver more opportunities for alumni and corporate partners to get involved with our circuit

- Juxtaposed to the Educational Curriculum and the development of an outgoing executive curriculum, we have been trying to identify other new opportunities, outside of conferences, to integrate alumni with current students in the circuit
- Better aligning corporate partners at JDCC with opportunities for students to attain new connections and professional development opportunities, through expanded and formalized networking sessions, mock interviews, and re-juggling partners with new academic cases to achieve a better foundation of fairness and eliminate subjective case sponsor continuity
- I will be working on the Calgary Roundtable 2016 event as we move further into August; the Calgary OC will be heavily leveraged during the CFE studying time as they have the connections and resources from both their great location and our CPP databases and previous contacts - after CFE passes mid-September, my dual role will ensure we can correctly improve upon PD opportunities for delegates and integrate business, government, and alumni partners
- I will continue to try to solidify a lobbying branch via the External portfolio and will aim to sign key partners for the 2016 summer events by sometime in the fall at the latest
- I will be looking to follow through on any agreements made between CABS and the DCS member society to grow the Atlantic Throwdown event for the upcoming March event
- I will also be assessing options on how my personal move abroad (but not too far from Toronto) will be best managed by the organization, by adding at least two key directors to help the Corporate portfolio grow this fall (one has already been confirmed to come on in September)

Sincerely,

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

## Vice President Marketing

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### Portfolio Update

With respect to the Marketing portfolio, a significant portion of my time over the past 3-4 months has been focused primarily on supporting the head office marketing activities associated with our summer program offerings. Going forward, this will continue to be the case until CBSC is wrapped up, but in the short-term thereafter I will be prioritizing outstanding website revitalization project tasks and strategic initiatives.

Here's a non-exhaustive list of what I've worked on or am currently working on:

- I've built brands for our programs that can be utilized year-over-year, as well as accompanying resources that are in a templated and standardized format for ease of transition
- I've centrally managed the marketing aspects of our flagship events (WCLR & ECLR, CBSC upcoming)
- I've worked closely with past CABS executive Adam Normand, as well as Calvin, on the revitalization project of our website, cabsonline.ca. This includes public facing pages, as well as the password protected components (has been referred to as the Portal or Exchange in the past)
- I am working on a Meet the Team social media campaign, which began with the CABS MGMT team and is leading into Phase 2, which is Meet the BoD!
- I will be working on supporting marketing and communication pieces associated with strategic review and policy development underway within each CABS portfolio.
- I will continue to be working on many relatively small design tasks associated with bidding materials, internal resources, and external marketing materials, which when added up should present significant long-term benefit to our programs, OC's, and head office.

Sincerely,

**Cody Mackay**  
Vice President Marketing

## Vice President Member Relations

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### Portfolio Updates

With respect to the Members portfolio, understanding that summer is an important time for you to maximize planning and bonding with your teams in anticipation for busy BSA season, I have intentionally focused on Head Office initiatives:

- Strategic member programming - details to come at CBSC!
- Data for Resource Centre website planning - following a bit of data collection from some of our Western members as a pilot, we'll soon be ready to plug in initiatives/ events and position information as our website goes through a makeover. This is in the works and I'll have more info (and info requests) when the time comes.
- Providing support for prospective members - updating information packages, connecting with presidents from non-member schools to explain CABS
- Schools include: Mount Royal University, University of Toronto (Rotman), University of Toronto (Scarborough), Western University

Other member-specific activities have included:

- Onboarding presidents who began their terms between conferences with a "CABS 101" welcome call
- Hosting the Mentorship Webinar

The result of our conversations at the beginning of the year allowed CABS to produce specific, member-focused learning curriculum at our conferences -knowing about everyone's goals and direction for the year also encouraged sharing of resources through Google Drive and communication across schools. Over the next few months I will be reaching out to you for another round of check-ins to keep on track as we align with NBSC content and build out more resources with our website revitalization.

Sincerely,

**Jessica Gutierrez**  
Vice President Member Relations



## Vice President Conferences

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### Portfolio Updates

The Conferences portfolio is an ever changing portfolio and is also a constant learning experience. My main focuses over the last few months have been around developing the systems we use to run our events. More importantly, I've been focusing on how we work with our Organizing Committees. Every OC has a different style and every host school has different resources and challenges.

A couple points on what's been going on behind the scenes:

- Modifying registration forms to more effectively collect the information needed at each time
- Scheduling calls with potential host schools to discuss the resources and challenges and how CABS could work with an OC from that school
- Interpreting post conference surveys
- Modifying the communication line between the CABS management team and the OCs
- Weekly meetings with OCs to check in and trigger the next steps

I'm very proud of what our host schools this year have been able to accomplish and I am eager to see what our future host schools will build having seen such amazing work done this year!

Sincerely,

**Jeanna Kozan**  
Vice President Conferences



## Vice President Competitions

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### Portfolio Updates

Within my portfolio, the last couple of months have been focused on getting the JDCC 2016 competition up and running. The end of summer and the fall will be focused on developing the Non-JDCC segment of my portfolio. Here is a non-exhaustive list of what I have been and will be working on:

Prior to CBSC:

- Work with the JDCC Executive Directors to finalize the OC
- Finalized contract negotiations with Hilton for JDCC and November meeting
- Wrote the JDCC Committee Terms of Reference
- Updated the JDCC Bylaws, turned them into the JDCC policy

Between CBSC and NBSC:

- Will update the competitions calendar
- Will update the JDCC bidding document
- Will create the JDCC promotional documents targeted to Faculties
- Will continue assisting the JDCC OC

Sincerely,

**Rose-Lyne Boghos**  
Vice President Competitions