

# Management Team Quarterly Update

## Quarter 3 Fiscal 2016

Delivered to the Board of Directors of  
The Canadian Association of Business Students  
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## Vice President Finance

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### Portfolio Updates

Q3 has been a whirlwind of a quarter filled with the usual balancing and advancement of operational duties and strategic initiatives. The finance portfolio made great strides in improving the administrative and operational capacity of the role in addition to strategic advancements aimed at delivering new programs and systems for you, our members. The quarter and associated work have been broken down by month and follow.

For the month of August, I provided payments to conference vendors, followed up on receivables, and managed post-CBSC 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, and maintain high operational standards.

For the month of September, I worked diligently with CABS Director of Finance to reconcile all of our accounts and generate the resulting Income Statements for our events to date. Presentation of document will be made at NBSC.

The finance portfolio remained focused on strategic initiatives and RoundTable and JDC Central Financing. On the strategic initiative front, refining our Accreditation Program has continued to be a priority to incorporate feedback. Additionally, I began working to develop a national extra-curricular transcript program with members of the executive team to validate and provide value for the outstanding initiatives you are all already involved with.

RoundTable and JDC Central were and continue to be focuses for the executive team and especially the finance portfolio. Payments were made to hold venues, and work with the Organizing Committee continued to lock in necessary items.

The usual duties of reimbursing expenses, invoicing delegates, arranging payments continued on the operational side of the portfolio for September.

October and the first half of November continued on with the progress made in the previous months through operation tasks and strategic initiatives. With JDCC ramping up team captains making the necessary preparations, finance was kept busy with communicating with members and invoicing teams for appropriate fees. With

initial payments now sent and received, remaining fees for registered delegates will be invoiced once numbers are confirmed and communicated with teams.

In addition to JDCC Finance, I continued to work closely with CABS director of finance, Jean-Phillipe (JP) Allen, to reconcile not only current fiscal year accounts, but also previous fiscal years to ensure that past and future reports can accurately inform the corporation. Reconciliations have been successfully conducted with many thanks to JP Allen.

Following up on the Board of Director's mandate to seek relevant insurance policies, I have consulted with agents at the Cooperators insurance and am working with them to procure an accurate assessment. Upon a thorough assessment of CABS' vital information, a targeted proposal will be considered and presented to Board for approval of purchase.

On the strategic initiative front, final amendments were made on the member accreditation program and will be presented for Board consideration. The amendments and revisions were cooperatively acted on between many of the CABS executive team portfolios.

I have worked to create new governing documents which will serve to oversee and structure the creation of new committees responsible for the administration and sustainability of new CABS programs. All new governing documents will be presented to board for consideration.

Seeking new ways to deliver value for our membership, I worked closely with Calvin Parker to create the framework and supporting documentation for the new Extra-Curricular Transcript Program. The program aims to provide verification and validation of CABS members' activities beyond the classroom which contribute to developing the outstanding leaders that make up our membership. The program's outline and supporting documents will be presented for Board's consideration and approval.

I wish you all the very best heading into the end of your first semester and the best of luck on your final exams!

Sincerely,

**Simon Bullock**  
Executive Vice President Finance

## Vice President Corporate Relations

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### Portfolio Updates

Over the course of the past quarter, our Corporate portfolio has, with more experience, looked to solidify itself and push our events and initiatives that offer strong professional development opportunities that we can get the external business community to jump on board with. JDC Central has remained a long standing success and will continue to be so as we slowly innovate the opportunities that the event offers for students to connect with our amazing partners. With two new regional directors working directly under myself, we hope to bridge the gap between events that constantly move from one area to another to bring longstanding partnerships to these events in our circuit. CABS Roundtable is the main focus of the corporate portfolio for the time being.

The External portfolio has made some good progress as we have been connecting with faculty, research organizations, and alumni to increase our clout as an organization as a whole across a variety of areas.

### Regional Directors

Our Prairies and Central Canada directors have been recently on-boarded and transitioned into their roles. Each has a particular area of expertise and through geographical locations, other sectors of convenience and/or knowledge. Our goal of the Prairies director is to mainly focus on Western facing firms, and to build our potential partners for WCLR and Roundtable.

As we further develop Central Canada connections and contacts our goal is to build longstanding partners for Roundtable and ECLR. CBSC will continue to be a “loss-leader” so to speak. The model of offering a free taste of our circuit worked well and we established connections thanks to our strong and dedicated alumni of the CABS circuit, which we will look to continue to do in the future.

Looking ahead, as we have further built out our potential leads from my time as a co-op and graduating student, we have circled in on companies with general Management Trainee Programs, our greatest area where we can build our corporate portfolio with strong professional development opportunities for our students. Currently, only EMCO and Enterprise (a previous partner) were sought after for their programs in this area. Post NBSC, our head office corporate team will be aided with F2017 Corporate Information Packages to further sell all the opportunities our circuit has to offer.

## JDC Central

Overseeing JDC Central has been a unique opportunity to learn what brings our corporate partners back year in and year out. I have had the pleasure of managing the relationships of our top partners and ensuring that in a year where partners wanted to not maintain their financial contribution to the event, that we still kept the partners happy at a competitive rate that still allowed our event to have a meaningful budget to work with. For JDC Central the corporate portfolio is proud to be bringing in over \$70,000 of monetary sponsorship, in addition to in-kind contributions.

For JDC Central, our biggest innovations to the event from a corporate perspective this year will be:

- Formalized mock interview processes on competition day; guaranteed interviews, guaranteed ROI for our partners, and guaranteed PD opportunities for delegates
- Corporate Passports: delegates will be receiving participation points for engaging in conversations at the Promo Booths to further increase interaction on-site
- VIP Cocktail: students will have the opportunity to earn a spot at the VIP Cocktail event prior to Gala either through strong academic or on-site networking success

Looking ahead, the Corporate portfolio is eager to work with our next bidders and hosts of JDC Central to increase these opportunities even further and evolve on our standard competition offerings for potential partnerships into more professional development opportunities for our students.

## CABS Roundtable

Due to the rollover of the corporate portfolio for CABS Roundtable there are not as many previous partners to source from. However, we have hopes that we will be turning budding relationships into strong partnerships with the following firms into strong partnerships:

- CPA Alberta
- Haskayne School of Business and Advancement Office
- Telus
- Hult International School of Business
- Riipen

Our Roundtable team will be continuing to develop leads over the next quarter to build a strong professional development offering at CABS Roundtable and add some buffer to our event's budget this year with a hopeful increase in its sponsorship

contributions. Our head office regional directors are also focused on building relationships into Roundtable partnerships ahead of any other event.

### **External**

As part of the External portfolio, I have been focused on the following tasks throughout this quarter:

- Further refining our CABS Executive Development Curriculum
- Dealing with the CFBSD on potential collaborative partnerships moving forward
- Liaising with the Conference Board of Canada on a landmark PSE research project
- Corresponding with 5 Days for the Homeless for program succession and guardianship

My work on our Executive Development Curriculum has been creating a program guide for public viewership on the program, but also refining the program as we have moved through our first few events of the Fiscal 2016 CABS Circuit.

In my External capacity I also recently connected with the recent Ontario regional head of the CFBSD. Through our talks we further established lines of communication on:

- How to be regularly involved in the national CFBSD annual meeting
- How to bring the Ontario regional meeting to JDC Central
- Costs and benefits (faculty perspective) on being a previous JDC Central host school

Recently, the Conference Board of Canada came to CABS in the hopes of being an intermediary between the Conference Board and business students across Canada in a landmark project the Conference Board is taking on. The Conference Board will be conducting a study on how post-secondary business education in Canada is performing in preparing students for their careers. The project will not rank business schools but try to evaluate what the future state of PSE business education in Canada will need to look like to meet the new and growing needs of students. Once the project is complete, CABS will have access to the full research report, including project findings. This will be crucial for my eventual successor in dealing with the CFBSD and government bodies in representing not only our members, but business students as a whole in Canada.

Finally, we have taken up recent discussions with current leadership of the 5 Days for the Homeless annual charitable initiative. We are hoping to further build our relationship with the current team as there is now an ideal time for the current team, who have led the program for the past 4 years, to pass on guardianship and execution to a new group of students. We hope that CABS, as a national

representative and strong partner with the 5 Days for the Homeless initiative, can take on some form of this future guardianship and succession.

Sincerely,

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



## Vice President Marketing

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### Portfolio Update

The Marketing Portfolio during Quarter 3 has retained a continued focus on strategic initiatives, improving our external communications presence, and providing marketing support for the governance and documentation initiatives underway throughout the team.

In August, our Marketing Director, Dan Park, developed a new standardized brand identity for our CABS Roundtable conference. This was the last piece in order to develop uniform event branding across all of the CABS offerings. I have also completed a branding initiative for our CABS Programs, developing unique CABS-branded logos for each program. Going forward, these brand assets will be more representative of our programs as we expand and grow them to the level they need to be at.

With respect to the CABS Website, my involvement has been minimized in this quarter, as Calvin Parker and Adam Normand have put in many hours to develop the portal functionality and add an abundance of exciting features that you'll soon be able to utilize. We found that when all 3 of us were working on web development, it was very taxing on our web server and actually made it less efficient to have a third person assisting on the project. In the coming quarter, we'll be able to take the structure that is in place to make design improvements and add functionality in an incremental manner, which will make the process much more manageable than the initial build phase was. We will also be targeting CABS alumni in search for a new director in the IT portfolio to assist with website maintenance.

As part of the communication area of the portfolio, I've been developing a social media strategy that will help us to integrate the entire team into our content generation system, and to add more automation to the process. For example, Calvin Parker has been using his connection to many CABS alumni, and has developed an automated system of gathering content for our new Alumni Features we have been releasing this month. Other examples include Competitions & Conferences features gathered by Jeanna and Jessica, and Partner features by Zac. We have also been in discussion with a potential new team member to assist us with execution of this strategy and upkeep of the blog component of the CABS website - keep your ears open for an announcement soon! We also sent out a survey asking members to nominate the exciting success stories of their peers to feature on our channels, but we haven't had much response to date.

This month, we have been developed a strategy and hierarchical system that outlines all of the CABS Publications we'd like to have, which includes a high-level CABS overview, promotional packages for our events, and lower-level documents



that need improvement such as bidding guides, and BoD orientation packages. I worked closely with Jessica & Jeanna to design promotional packages for JDC Central, CABS Roundtable, CABS CBSC, and CABS WCLR/ECLR. A lot of work went into these, and we hope you're as excited to see the end result as we are!

In the next quarter, I'm looking forward to working more actively with both the Roundtable and JDC Central program teams as those events draw near. For both events, we are targeting national media partners to promote their size, scope, and importance to the Canadian business community.

I've certainly noticed that there are some really innovative and exciting things being done by all of your societies this year, and that makes me so excited! Keep up the amazing work!

Sincerely,

**Cody Mackay**  
Vice President Marketing

## Vice President Member Relations

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### Portfolio Updates

Quarter 3 for Head Office initiatives, specifically the Member & Alumni Relations portfolio, has included continued effort on strategic initiatives to benefit the member experience.

Following CBSC in August, we made sure to take the feedback from you, our BOD, regarding the CABS Member Accreditation Program. I supported Simon's efforts to make amendments to the program by relaying information from BOD calls and the conference. I help 15+ half an hour to one hour calls at the convenience of BOD members who were interested in doing an informal check-in. Not everyone participated, but from the calls I gained a more thorough understanding of what events and programs were happening at each school, the progress, and areas of improvement. This continued effort helps us to better target our program offerings and executive development curriculum at conferences.

A highlight from this quarter is that we delivered two more webinars as part of an Elections series. Alumni from Concordia University (CASA JMSB) and University of British Columbia Okanagan (MSA - presented by our very own VP Marketing Cody) created presentations to discuss the documentation and applicant considerations when running elections. These sessions were held in anticipation of NBSC, where elections are a hot topic. The turnout for these sessions was low, and I attribute it to a combination of decreased notification time and busy time of year with midterms/BSA events. We strongly encourage you to participate in these sessions, let us know what topics are of most interest to you, and view recordings and resources when made available following the webinars. At the end of the month, we are looking forward to coordinating with University of Alberta to talk about a Transition/Student Engagement webinar, very relevant as your executive council starts to look for the next candidates and evaluate performance to see what can be improved for next year.

I reconnected with a few prospective member schools such as Guelph-Humber, St. Mary's, and University of Toronto Rotman. There is still interest from these schools but due to the timing they will likely get involved with CABS in the next fiscal year, possibly submitting member applications for Roundtable or WCLR/ECLR.

Another initiative that I have helped with is to create CABS Program guides for Accreditation, Extra-Curricular Transcript Program, and the Awards Program. In these roles as well I supported Calvin, Simon, and Zac when appropriate. In the spirit of nominating and getting used to submitting names for recognition, Cody and I developed the marketing initiative asking for Peer-Nominated Member Success Stories. The thinking behind this is that we can strengthen the network and

acknowledge the great work you are all doing across the nation by highlighting successful initiatives of your peers. We have yet to get rolling on this campaign/marketing initiative but encourage you to nominate your peers for this and we will be revisiting this as well.

As mentioned briefly in the October update, I also assisted Calvin Parker and Adam Normand in a support role for the website. I looked into opportunities to benefit the member/ user experience and integrate our Google Drive Resource Centre and all the documents in meaningful ways. More work is to be done to make this a collaborative platform for all of us to get used to but we are very excited about this new launch.

In the next month, I will be helping to train and involve our newest Management Team member, Kingsley Eze. Kingsley will be supporting President and Members initiatives as a Program Administrator. As I work with Kingsley I will develop a portfolio transition guide for the next VP Members and Alumni Relations (could be you!)

Thanks very much for your continued commitment to making the CABS network amazing! Good luck with exams and congratulations on doing awesome jobs in your roles these past few months!

Sincerely,

**Jessica Gutierrez**  
Vice President Member Relations

## Vice President Conferences

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### Portfolio Updates

It's been a busy couple of months in the conferences portfolio. Most of the focus has been around sustainability and the future of our CABS Flagship Events. With three of the events that take place during my mandate underway it is time to take what I've learned and put it into action for future teams.

Another exciting aspect of my term has been building bid packages with members of our CABS network. I am confident that after the next Board of Directors meeting, we will officially have host schools for all CABS events until Roundtable 2017. Historically, bids have been passed and events have run with less than three months of action time. The average amount of action time for future events is over eight months. This means, better programming, potential for more sponsorship and more familiar and educated organizing committees.

A couple of the key highlights this term are as follows:

- Booking venues with CABS Roundtable OC
- Creation of CABS Event Promotional Packages
- Collection of members' event details for content calendar
- Assisting in developing bids for flagship events

I am excited to move into the next quarter with full and eager teams.

Sincerely,

**Jeanna Kozan**  
Vice President Conferences

## Vice President Competitions

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### Portfolio Updates

Quarter 3 for Head Office initiatives, specifically the Competitions portfolio, has included continuous efforts on promoting Case Competitions across the CABS network.

Following CBSC, the first project both myself and Jeanna took on was the Conferences and Competitions Calendar. The month of September was dedicated to getting in touch with all our members to gather the necessary information to populate the calendar. Presidents, as well as the different organizing committees were contacted and we were pleased by the number of responses! Thanks to your cooperation, we were able to create the first Conferences and Competitions Lookbook which we hope will be a useful tool for your academic and conferences programs! This Conferences and Competitions Calendar is something that will keep in being continuously updated and these events will continue to be promoted through the various CABS channels on a regular basis.

In October, I was able to focus my attention on a delicate part of my portfolio that was an important pillar of my electoral campaign: Getting an agreement signed between REFAEC and The CABS concerning JDC Central being hosted in the Province of Quebec. The purpose of this agreement was to allow Quebec school with dual memberships and who compete at both JDC and JDC Central to host JDC Central if they wished. An agreement of this sort had been in the talks for the last two years however, no document had ever been approved by both parties. I am happy to tell you however that with the help of Bertrand Sinniger, current REAFEC President, we were able to draft an agreement which we believe would allow Quebec schools to host JDC Central while making sure that neither JDC nor JDCC is at risk and that sponsorship will not be cannibalized. This document was presented at the last REFAEC Congress meeting and was approved by the REFAEC Presidents. The final step is now to have this document approved by the REFAEC Board of Directors which will be held later this year. Please note that the REFAEC governing structure is different than The CABS structure, where Presidents are the Board of Directors are two different entities.

The month of November was then fully dedicated to building documents which are meant to promote JDC Central, support and guide its prospective Program Teams (Organizing Committees) and therefore, contribute to the competition's sustainability. The JDC Central promotional package was the first document to be completed. This document is meant to give a solid overview of the competition and covers the JDC Central history, the JDC Central values and mandate, as well as the different components of the competition. This document was created following some of our member's feedback regarding the challenges to gain faculty support to

host JDC Central. Therefore, it is strongly suggested that schools interested in becoming future hosts of JDC Central send this document to their faculty members.

In addition, it was brought to our attention that prospective JDC Central host schools did not have a concrete and concise guide to assist them in putting a bid together. For this reason, I assembled a document which provides all the information a prospective JDCC host could need. The guide includes information on how to work with the respective CABS Vice Presidents, how to assemble a Program Team, the governing JDCC documents, the resources made available to the prospective JDCC Program Team by The CABS etc.

In the next months, I hope to be working very closely with our potential Director of Competitions, Christopher Carpini, on a part of my portfolio that I have not been able to tackle yet unfortunately: Building a foundation for Business Schools interested in setting up a committee fully dedicated to case competitions.

Once again, thank you all so much for your continuous support and feedback! I look forward to meeting you all again at our next conference!

Sincerely,

**Rose-Lyne Boghos**  
Vice President Competitions