

EXECUTIVE REPORT

*Lauren Griggs, CFMS VP Finance
2018 Spring General Meeting Report
April 27-28th, 2018; Halifax, NS*



I. DESCRIPTION OF POSITION

The VP Finance is responsible for overseeing the use of funds throughout the year and the creation of the new budget, as well as seeking sponsorship opportunities and collaborating with external agencies. They are also responsible for developing human resource policies and procedures. The position requires chairing and working with the Finance Committee and Strategic Initiatives Funding (SIF) committee.

II. PAST AND CURRENT ACTIVITIES

- Signed partnership contract with MD Financial
- Put together SIF and FinCom committees
- Held first FinCom meeting in December
- Reviewed AGM Bids for 2018
- Awarded first round of SIF funding
- Currently developing new sponsorship opportunities and building relationships with:
 - o MNP - tax services for students and AGM sponsorship
 - o PTMA's - disability insurance

III. FUTURE PLANS FOR FINANCE

- Continue to look into new sponsorship opportunities
 - o Telus
- Start to develop policies for future HR strategy
 - o Hire part-time admin assistant
- SGM Financial Update
- Streamline SIF funding process and hold second round

IV. MEETINGS ATTENDED

Date	Meeting	Location
October 13-15/17	CFMS Fall Board Meeting	Ottawa
October 26/17	MDFM introduction	Teleconference
November 8/17	PTMA's and MDFM	Toronto
November 17/17	FMEQ and Sponsorships	Teleconference
November 19/17	CFMS November Board Meeting	Teleconference

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November 19/17	AFMC Call	Teleconference
December 5/17	OnBoard MD	Teleconference
December 7/17	AGM Bid Discussion	Teleconference
December 9/17	Finance Committee	Teleconference
December 10/17	SIGs/SIFs	Teleconference
December 10/17	CFMS December Board Meeting	Teleconference
January 6-7/18	CFMS Winter Board Meeting	Calgary
January 8/18	MNP re. Sponsorship	Teleconference
January 9/18	MDFM	Teleconference
January 31/18	Sponsorship/Services Discussion	Calgary
February 4/18	CFMS February Board Meeting	Teleconference
February 8/18	Checkpoint with Henry	Call
February 10/18	CFMS-MDFM Checkpoint	Teleconference
March 11/18	CFMS March Board Meeting	Teleconference
March 22/18	Financial Literacy Discussion with MDFM	Teleconference
March 23/18	PTMA's re. Sponsorship	Call
March 24/18	SIF Funding	Teleconference
March 31/18	SIF Discussion	Teleconference
April 7/18	Checkpoint with Henry	Call
April 7/18	SIF Discussion	Teleconference
April 8/18	CFMS April Board Meeting	Teleconferences

V. CONCLUSIONS

It has been a pleasure working for the CFMS Board as VP Finance and getting to know my other board members better, as well as the intricacies of CFMS. I am excited to see where the rest of this year takes me.

Lauren Griggs

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Vice-President Finance