THE ENGINEERING SOCIETY OF QUEEN'S UNIVERSITY

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Vice-President (Operations)

Summer Plan 2016

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1.0 Introduction

Hello All!

I will begin by stating how excited and honoured I am to work for the Engineering Society this summer. From my understanding the summer is a great time to take on projects for the society, but often goes by very quickly. I will use this plan as a guide throughout the summer to keep on track and ensure my time is well spent.

The operations portfolio requires both a working knowledge of many technicalities and minute details within the society, as well as the ability to look at the big picture and the society as a whole. I plan on becoming an expert in all of these workings so I can be a useful resource to all matters relating to the operations portfolio.

I am aware that this report outlines several very ambitious projects. However, I am confident in my ability to achieve these alongside the necessary responsibilities of the Vice President Operations role. Our society operates primarily on volunteers, and I plan to volunteer my time outside of the paid 35-hour work week this summer.

Underlying Themes

Documentation: Consistent documentation of tasks and procedures undertake will ensure a much improved and useful operations manual for future Vice-Presidents.

Communication: Making it clear what I'm doing throughout the summer while gather input from relevant stakeholders. Many of the projects listed in this plan require the input of many people and I plan on using that input to provide meaningful long-term change.

Service Cooperation: Many projects plan to help bring the services together. The society should proudly display the services we offer and there are projects I have planned to help advertise these great businesses.

2.0 Learning

Learning is very much an ongoing aspect of this role in particular, especially at the beginning of the summer. Outlined here are some topics that I plan on becoming much more proficient in during the beginning of the summer.

Topic	Priority	Est. Time	Description	Deadline
General VPOPS	1	2 days	- Read through all relevant reference material - Policy, historical documents - Operations and transition manuals - The entire filing cabinet	April 29th
Finance Portfolio	1	1 day	- Operations and transition manuals - Full responsibility list	May 2nd
Services Portfolio	1	2 days	- All services review - Head Manager operations manuals	May 4th
IT Portfolio	1	1 days	- Review material and systems - Little material here, more consultation	May 5th
Liability	1	0.5	- Discussions with Dave Walker - Focus on reducing liability for the society - Develop comprehensive understanding	May 6th
Accounting	1	0.5 day	- Sit down with Roxanne - Develop full working knowledge of system - Develop full working know of payroll and taxes	May 6th
AODA Compliance	2	3 days	- Research and Develop a full AODA compliance plan for the operational portfolios of the society	August 1st

The bulk of this learning will take place early in the summer. However, I plan to tackle as much of this as possible before the summer begins. Additionally, this experience will surely consistently be a learning role throughout. The end goal of the learning section is to be the one person able to answer the majority of questions people have about the operational aspects of the society. Ranging from information technology infrastructure to accounting procedures to "what is this invoice for?" I plan to be able to readily tackle all of these questions.

3.0 Static

Much of this role also encompasses static responsibilities throughout the summer. These responsibilities range from helping operate some services, to keeping contact with directors and managers. This section outlines the majority of these static responsibilities.

Meetings

Throughout the summer I will be conducting static meetings with many people to gather input, provide advice and keep up-to-date with what current projects are on-going.

Position	**Frequency**	**Subject(s)**
Executive	Weekly/Daily	- Ongoing issues
Jay	Weekly/Daily	- Projects/Ideas - General updates
Director of Services	Weekly	- Service updates - Planning staff training - Input on projects
Director of Finance	Weekly	- Updates - Input on projects
Director of IT	Weekly	- Updates - Input on projects
Services Managers	Weekly/Monthly	- Provide updated Service Operating Procedures - Help with budgets - Help with Strat Plans - Any summer projects
AMS Exec	Weekly/Monthly	- Discuss ideas for cooperation - Updates - Upcoming issues
Dean/Faculty	Weekly/Monthly	- Discuss relevant issues - Maintain positive relationship - 67 Union Street Input
Roxanne	Bi-Weekly	- Discuss current financial state - Future improvements - Streamlining of system
BMO Reps	Monthly	- Form a strong relationship - Investments, credit cards & bank accounts
Advisory Board	Monthly	- Strat Plan and Budget Approval - Board Projects

Administrative

General administrative tasks include responding to e-mails, receiving and sending mail. This remains a top priority throughout the summer however should take up a little time each day.

Finances

There is a series of ongoing financial duties that will be my sole responsibility to fill. The majority of which are small day-to-day tasks including paying invoices, cheque requisition, deposits and managing accounts. Additionally, payroll for Science Quest and assisting them for their operations will be necessary.

Rituals/BBQ's

An ongoing part of the summer is operating six Rituals and 10 BBQ's. This is a great time to interact with students, professors and others on campus while improving brand awareness of the society. In total these require about one-week total spread throughout the summer.

Reporting

The Executive as a whole will report weekly/bi-weekly on the society and what projects are being taken on. This is a static occurrence that is valuable to all members of the society, to ensure accountability and transparency, especially given that student dollars pay for the executive salary. I expect reporting to take up on average an hour a week.

Documentation

A consistently recognized issue with our society is transition. Throughout the summer, I will devote 30-60 minutes at the very end of every week to put towards transition materials. This time will be spent both modifying/fixing current material, and adding relevant material from the week before. This will consistent of three main "mini-projects":

1. Operations Manual - A comprehensive operations manual
2. Transition/History Report – A compilation of past VPOPS stories, history of society and services, more personal opinionated material
3. E-File Database – Develop/compile all electronic files from past years, ensure information is easy to find and access for future VPOPs. Back up on hard drive.

4.0 Spaces

We as a society are very lucky to have the space, both in location and square footage, that we do. Especially considering that this space comes with great value to us, providing lots of use, and little costs. I firmly believe we however should be using this space **much better**. I have outlined here a series of projects I wish to take on over the summer to improve our spaces. Our two main spaces are the Clark Hall lounge, and the Tom Harris Lounge.

Clark Hall

Our most poorly used space. To help set the tone for the coming year of making Clark Hall a space for **ALL** students to use; the first step is appearance. Beginning with the finance office and progressing by cleaning the lounge, and providing better backpack storage. There is certainly a lot of work to do in Clark, I plan on overcoming the challenges of coordinating groups such as Physical Plant Services, general contractors and off-site storage facilities to make this space better.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Finance Office	1	2 days	- Move files to storage - Buy desks - PPS/ITS for Internet - Setup computers	June 1st 2016
Full Clean & Organize	1	1.5 days	- Lounge - Stairwell - Coatrack & Cubbies	June 14th 2016
Bathroom	1	1 day	- Contact PPS - Determine course - General Contractors - We need a functional washroom	May 31st 2016
Windows	2	1 day	- Contact PPS - Push them to install new windows	May 31st 2016
Key Database	2	0.5 days	- A serious security issue that can be improved - Complete current database	August 1st

Tom Harris Lounge

The Tom Harris (EngSoc) Lounge is the most visible space of the society. As an exec, we plan on creating a more inviting environment for all students to enter. Listed below are some projects I plan to undertake to further improve this space, both for those involved and those who aren't.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Full Clean	1	1 day	- Cleaning Supplies	May 15th
Stakeholder Consultation	1	0.5 days	- Determine the wants and needs for users of the space - Determine criteria and a working set of procedures for office hours	June 1st
Finance Corner	2	0.5 days	- Create a centralized location for users - Contains cash boxes, debit/credit machine - Forms and instructions - Ingoing and outgoing cheques - Coin Counter	June 14th
Mailbox Overhaul	1	0.5 days	- Redo all mailboxes - Create one centralized location for all mailboxes - User-friendly	June 14th
File Storage	2	1 day	- Provide each director with a clearly labelled file space - Meant to keep clutter out of mailbox - A space for material	June 21st
Office Supplies	2	0.5 days	- Centralized space for office supplies	June 21st

Additional Storage

Finalize and document a consolidated storage site for the Society. This is where orientation week, science formal and the society can all store long term assets and files. This will need to be accomplished before the finance office can go in place.

5.0 Finance

The three major topics I have projects in with regards to the society's finances are outlined here.

Society

These projects are society wide initiatives regarding that cash assets we own. The budget is completed annually by the Director of Finance (DoF). This is ratified by council and is crucial to determining how the society spends student dollars throughout the year.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Complete Society Budget	1	2 days	- Work with DoF to create society wide	June 31st
Investments	1	3 days	- Restructure our investment portfolio to ensure better use of student money	August 1st

Organizational

There are several organizational improvements that can be made within the society's finances. These improvements seek to make the "Bank of EngSoc" easier to use and improve our society's efficiency.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Chart of Accounts	1	0.5 days	- Update charts of Accounts for society	June 10th
Internal Account Transfers	1	2 days	- Develop a system to remove the need for cheques to and from the services and society	June 10th
Information Accessibility	1	1 day	- Develop with DoF a system to increase the accessibility of account information for users of the Bank of EngSoc	July 1st
Fiscal Year	2	1 day	- Work with DoF and bookkeeper to develop a plan to shift fiscal year to align with services	August 1st

Online Payments

The society can greatly benefit from a **centralized** online payment system. Groups that bank with us, including clubs, teams, conferences, events and services could all use a system that direct deposits into their Engineering Society account from the internet. I plan to address this problem this summer, with the first priorities being the discussion of policies and stakeholders. A key aspect of this plan is documentation, of both the policies and procedures to ensure future teams can continue to use this system.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
ITS Policies	1	0.5 Days	- Limiting and required factors for a centralized online payment system	May 30th
Stakeholders	1	0.5 Days	- Discuss possibilities and affects with GM, Exec, Bookkeeper - How to implement with Society, Services, and Clubs etc.	June 14th
WEM of Options	2	0.5 Days	- Research and online payment options - Create a weighted evaluation matrix of options	June 21st
Implement	2	2 days	- Integrate and test solution - Create an easy to use guide and template to introduce to users	August 1st

6.0 Services

During the summer, there are many projects and ongoing tasks that service managers cannot complete given that they're often working elsewhere. These are listed here, additionally, I have made it clear to service managers that I am a **resource** for them during the summer.

Finances

These are small projects I will pursue to improve the services and help managers with operations when it comes to the financial side of their business.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Year End Financials	1	5 days	- Work with Bookkeeper to wrap up year end for all services	May 30th
Monthly Deliverable Timetable	1	0.5 days	- Create a timeline for monthly deliverables - Both for VPOPS and business managers - Keep Books up to date	June 1st
Spending Mechanism	1	2 days	- Work with the Bank, DoS and Roxanne - Develop an accessible system for spending service money	July 1st

Service Operations

These are standard ongoing parts of being VPOPS, they encompass helping service managers throughout the summer maintain their service and work on initiatives they are unable to.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Manager Duties	1	5 days	- Continue with general service manager duties required over the summer	Ongoing
Finances	1	3 days	- Submit month end - Fulfill invoices - Collect Payments	Ongoing
Science Quest	1	5 days	- Assist with Science Quest Operations - During peak times - Staff on Vacation	Ongoing

Documentation

Helping ensure a proper transition in the services for years to come, the following is a short list of projects to help improve service transitions and training.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Staff Training	1	1 day	- Work with DoS and Head Managers to further develop and plan staff training	August 1st
Manual Database	2	0.5 days	- Create an history database of panels	July 15th
Manager Training	3	0.5 days	- Work with DoS to update Service manager training	July 15th

7.0 Information Technology

I have two very ambitious projects outlined for this portfolio. The Information Technology work done this summer will begin by focusing on the society's infrastructure. Properly migrating all servers to RackSpace in consultation with them and the Director of IT is not only necessary, but critical for future work. The next big project is the creation of a Hiring Portal. This will be with the help of the Director of IT and will take place primarily during unpaid hours, to recognize the volunteer efforts being put in by the Director of IT. Both of these projects will become the main priorities of a Summer IT position if applicable. However, I still seek to facilitate them.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Infrastructure	1	4 days	- Move all servers to RackSpace - Lay foundation for IT growth - Documentation	August 1st
Hiring Portal	1	5 days	- Work with DoIT to evaluate and implement a new EngSoc Apply system - Heavy involvement and work outside regular hours	August 15th

8.0 Advisory Board

The theme I would like to address with regards to the advisory board is continuing the great work done this past year with improving the interaction with service managers and looking to the long term.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Strategic Planning	2	2 days	- Work with SPC[1] Chair - Working with DoS and Service Managers on Strategic Plans - Developing the Services Long-Range Strategic Planning report	June 30th
Annual Report	2	1 day	- Develop the Structure for an Annual Report Produced by the Advisory Board - Outlines Corporate Initiatives and services to general members	August 15th

9.0 Other

A few other considerations throughout the summer that my time will go towards.

Project	*Priority*	*Est. Time*	*Description*	*Deadline*
Assist Orientation Week	1	5 days	- Help with budgeting and operations	Ongoing
Assist Science Formal	1	2 days	- Help with budgeting and operations	Ongoing
Painting Year Crests	2	0.5 days	- To show off during orientation week	August 31st

10.0 Conclusion

Thanks for giving this a read, as always, feedback and improvements are welcome. Check out the next page for my Gantt chart of my summer. This will be my guiding timeline throughout the summer. I will be producing weekly and monthly reports along with the other executive to keep ourselves accountable and you informed! Once again, I am so excited and honoured to work for the students this summer

[1] Strategic Planning Committee

11.0 Appendix – Gantt Chart

ACTIVITY	START	DURATION
Learning	1	1
Finance - Year End	1	2
Clark -Finance Office	2	2
Clark - Windows	2	3
Clark - Clean & Organize	5	1
Clark - Bathroom	2	3
Tom Harris - All	6	1
Finance - Budget	6	2
Finance - Investments	6	2
Finance - Organization	5	4
Finance - Online Payments	8	3
Services - SOP	5	3
Services - Spending Mechanism	11	3
IT - Infrastructure	7	6
IT - Hiring Portal	12	4
Advisory Board - Strat Plans	2	6
Advisory Board - Annual Report	9	4
Corporate Initiatives Help	14	3