



Happiness
MANAGEMENT SOCIETY

Annual Report

2025

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Intro

The agency became incorporated on 3 July, 2024. The Annual Report for 2024 covered up to 1 August, 2025. This report will cover 2 August to 31 December 2025.

The plan is for annual reports in the future to follow the calendar year.



This Reporting Period

Steve appeared on the podcast “Health Empowered” which is run by Audriana Monteiro who is a physiotherapist and trauma informed yoga teacher from Victoria BC.

Steve has looked at ways to increase the number of clients that he is seeing for the society. There may be capacity for one more client, depending on how things are going with the current clients. Steve has used Psychology Today as the main source of advertising. It is a little slow, but given the society has chosen not to dedicate resources to building up an online presence the society has not pursued this as an option for finding more clients.

The other area that has had significant work done, has been to create spreadsheets for tracking the society's financial records. These spreadsheets are tracking all costs and expenses, as well as revenue. The spreadsheets have been able to find that a closer tracking of payments for sessions done is going to be helpful moving forward.

The spreadsheets are going to be able to track who has an appointment and once that appointment has happened it is going to be able to track that a payment for that session has been made and that a case note for that appointment has also been recorded. Cleaning up some of the practices that need to be managed effectively.

The number of blogs needed to be written needs to increase, because although there have been a few added in this reporting period the volume is not as much as the society should be producing.

The Board

It has become clear that for clarity of role it is going to make most sense if Steve steps down as the President of the Board to take on the position of Executive Director of the Happiness Management Society. Steve is looking forward to serving the board as he takes on some of the major roles of growing the society.

This will mean that at the AGM Adam will be nominated to stand for the President's position. All other positions will stay the same, as everyone has agreed to serve another year. As the society grows over time, there will be a need to look at positions being of a two or three year time and not all positions should be up for re-election in order to offer more stability and manage turnover.



The Board

Roles that Board Members can take on

Board members have a very important role in the development and stewardship of the society. They are responsible for ensuring the society acts lawfully, ethically and professionally. The main way this is done is to engage at board meetings.

Further roles and responsibilities that are not attached to a specific role include:

- Writing articles for the website. This should be a collaborative exercise where possible.
- There is a need for work to be completed in Canva, such as posters and worksheets etc.
- Providing peer/supervision.
- Editing and proofreading material produced by the society.
- There is a role for the society to have a social media presence. Until the society has a paid person to do this work, occasional posts by board members would be very helpful.



The Appointment of an Executive Director

The society feels that the workload that is being generated warrants the appointment of an Executive Director, so that all the responsibilities and requirements of the society can be met. The purpose of the appointment is to ensure the work that is needed to be done, is done.

There needs to be quarterly board meetings where financial reports are approved by the board. There needs to be focused work on applying to become a charity as well as promote the society so that the work it is doing is seen by more people.

Although it is recognized that for this position 3 hours a week is not going to cover off all the work that is needed to be done, the agreement is for 3 hours a week, so that the cost is not going to hinder the society until the society can build up income that can cover the cost. The hourly rate is going to be inline with the society's constitution, which is to pay a living wage for Maple Ridge. Like the cost for the counselling sessions the society will pay when it has the money, which will take time.



Financial

← Finalists announced

Closing Words

Although the reporting period is half a year, there has been progress in a number of areas. Jon and Steve ran a happiness course for 6 weeks and although attendance was low, those who did attend seem to get a great deal from it. Getting the financial recording system clear has also been a major milestone.

Next year the goal of applying for Charity Status is going to be the overall goal for the year and Steve will also see if he can get more speaking engagements.

