

**Financial Management
Institute of Canada**

Educate, Inspire, Empower

2016-2017

ANNUAL REPORT

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fmi  **igf**®

MESSAGE FROM OUR PRESIDENT

Martha Okot Thomas



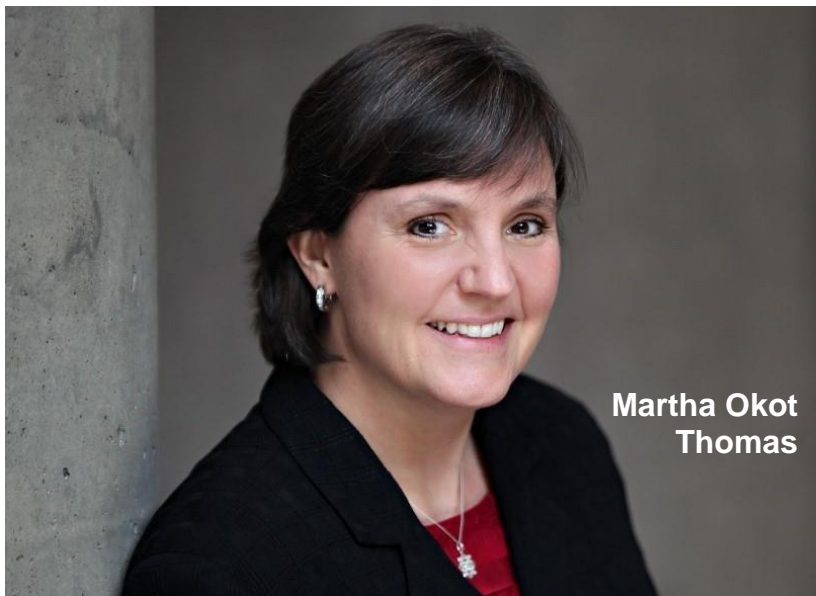
It is my pleasure to present the 2016-2017 Annual Report for the Financial Management Institute of Canada (fmi^{igf}).

In the past, transformation was based on one or two initiatives that each had a beginning and an ending. In today's environment, transformation is a requirement and a constant. For us to remain relevant, we must continually transform to meet the changing demands of our members and our community.

I am proud to say that we are putting the final pieces of the new governance structure in place. As you may recall, our previous board had 33 members and the new board has nine.

This has given us the ability to be more flexible and more responsive to the needs of our chapters and our audiences.

We are making better decisions and we are making them faster. We are also making better use



Martha Okot Thomas

of our resources to get more accomplished.

Our accomplishments this year include:

- Hiring our new CEO, Christopher Egan
- Launching the new board orientation tools
- Improvements to our corporate reports
- Redesigning our e-learning courses
- Another successful PD Week (2016)
- Another successful PSMW (in Winnipeg)
- Developing a microsite for PD Week (2017)
- Enhancing relationships with our partners at CPA Canada, Association of Government Accountants (AGA) and the Canadian Academic Accounting Association (CAAA)

- Continuous refinement and clarification of the roles and responsibilities of the National Board, Chapters and the Chapter Advisory Council.

We value our relationships with all levels of government (federal, provincial and municipal), and the support they offer our programs. Our goal is to provide high-quality professional development products to support the needs of the public sector across Canada.

My year as president has been incredibly rewarding. I have been supported by a talented board of directors, who have worked hard this year and accomplished what we set

Survey says:

As the result of a survey that was sent out to our National Board and Chapter Presidents, we confirmed our organizational values:

Professional
Member-Focused
Collaborative
Relevant

out to do.

I am endlessly in awe of the amount of volunteer time that is given by our board, our chapters, our PD Week committee and our PSMW committee. Thank you for your continued commitment.

As I pass the gavel to the incoming president, I am confident that fmi^{igf} is headed in the right direction and will continue to grow and transform under the new president's leadership.

Thanks for this incredible opportunity.

Martha Okot Thomas,
CPA CA
National President

OUR VISION

Education is the passport to the future



At fmi*igf the sky is limitless.

With a strong foundation in place, fmi*igf is poised to solidify its foothold in the financial management community across Canada.

The successful redesign of our e-learning courses was met with positive reviews in test groups, leading fmi*igf to form a team which will roll out new online courses during the fiscal year to complement the recently redesigned selection.

Our cutting-edge courses allow participants to earn professional development credits, while offering subject matter that is both relevant and meaningful.

In conjunction with partners like the CPA, IFSD, CAAA and AGA, fmi*igf will increase its top-notch professional development for the financial management sector.

Whether it's delivering e-learning, professional development events, micro-events or webinars, fmi*igf



Delivering professional, cutting-edge e-learning courses is a key part of fmi*igf's mandate.

plans to enhance its presence at the federal, provincial and municipal levels in the coming year.

A revamp of the fmi*igf website will be undertaken in 2017-2018, with an emphasis on redesign and the quality and quantity of content. The microsite developed

for PD Week 2017 will be used as the building block for the website's redesign.

Improvements in all aspects of social media will also be a key component as fmi*igf gets set to unveil an updated marketing plan for the fiscal year.

All About FMI

The Financial Management Institute of Canada (fmi*igf) is a nationally recognized, not-for-profit volunteer association founded in 1962.

Supported by its national office in Ottawa, fmi*igf operates 14 chapters (See Page 6) across Canada, directed by volunteer boards, both nationally and regionally.

Through volunteer committees and working groups, fmi*igf delivers professional development events (PD Week, PSMW),

seminars and workshops to the public sector.

fmi*igf offers a series of e-learning courses, e-journals and webinars, covering high-level, universal themes with a focus on relevant and contemporary issues in financial management.

fmi*igf is the leading source in Canada for professional development in new and emerging trends, best practices and topical issues to public sector financial management stakeholders.

MESSAGE FROM OUR CEO

Christopher Egan



We are blessed and truly appreciate our tremendously dedicated and hard-working volunteers who form our fmi^{igf} family, supported by our multi-talented national office.

With more than 300 strong and active volunteers from coast to coast, from CFOs to nascent financial officers, our family keeps growing.

It is this kinship that marries our strategies to our operations.

Standing on this solid foundation, fmi^{igf} is built for continued success.

Our strategic partnerships advance our structure, and span from CFO councils to professional associations to universities.

These alliances augment our ability to deliver on our desired strategic outcomes at the federal, provincial and municipal levels.

By growing on-demand and in-person training, we will increase the depth and breadth of competency-based learning across Canada. This includes e-learning courses, professional development events and webinars.

Our curriculum development is structured around learning taxonomy and applies pedagogical methodology. This results in a distinctive level of education



whether it's a micro-course or hybrid learning.

We would also like to thank our private sector partners for supporting our innovative work.

Embracing and applying new technology to existing operations will enable new digital capabilities resulting in a greater variety of quality learning products.

Moving forward we are more agile and diversified, allowing us to meet the ever-changing needs of our course participants.

We are a collaborative community working with other professional organizations to further best practices across disciplines.

Our enhanced learning products will educate, inspire and empower!

WHO WE ARE



Board of Directors

CEO, Feb. 21, 2017 - Christopher Egan, B.Comm, BA (Econ.)

CEO, July 1-Dec. 9, 2016 Mathieu Langelier, MAP

President Martha Okot Thomas, CPA, CA

Past President Jean Labelle, CPA, CMA

Vice-President Jim Randall, CPA, CGA

Secretary-Treasurer Derek Cockburn, CPA, CGA

Eastern Regional Director Linda Dow, CPA, CMA, MBA

Central Regional Director Jonathan Hood, CMA, CPA, CPFA, MBA

Western Regional Director Athena Dinos, CPA CGA, MBA, B.Comm

Director, Organizational Development (Appointed) Shawn Johnson, BBA

Director, Orientation and Onboard Design (Appointed) Barb Kelly, CPA, CMA



Keynote speaker Guy Laflamme takes a selfie with the audience of 1,050 as his background during PD Week 2016.

Chapter Advisory Council

Chair Nicolas Delisle, M.Sc, CFA

Halifax Frederick G. Donaldson, MPA

Capital (Ottawa) Janet Mrenica, MA, CPA, CMA, PFA, ACC

Edmonton Peter Neuschaefer, BBA

Fredericton Melinda Pedersen, CPA, CMA

Manitoba Cindy Dryden, CPA CA

Montréal Alexandre Cavuoti, CPA, CGA, LL.M.

Ontario Garry Wuschakowski, HBBA

Prince Edward Island Derwin Banks, BBA

Québec Eric Maranda

Regina Veronica Gelowitz, CPA, CMA

St. John's Sonya Keeping, CPA, CMA

South-East New Brunswick Valmond Bourque, CPA, CGA

Vancouver Carlton Gee, BA, CGA, MBA

Victoria Jason Stevenson, CISA, CISSP

Working Committees

PD Week 2016 Chair Peter Syntetos

PD Week 2016 Vice-Chair Sylvie Tanguay, CPA

PSMW 2017 Winnipeg Local Co-Chair Robyn Van Vilet

PSMW 2017 Winnipeg Local Co-Chair Lynn Cowley

National Office Staff

CEO, Feb. 21, 2017 Christopher Egan, B.Com, BA (Econ.)

CEO, July 1-Dec. 9, 2016 Mathieu Langelier, MAP

Manager, Marketing & Communications Cheryl Elliot

National Office Administrator Lynn Carroll

E-Learning & Media Coordinator Nicolas Drolet

National Events Coordinator Caroline Désilets

Instructional Designer Joanne Ouellette

Sponsorship Karina Navarro

Student Assistant Riley Morrow

Administrator, FMI Capital Chapter Jason Katsikaris

PD Week 2016

Shaw Centre • Ottawa, Ontario
November 22 – 25, 2016



WHERE WE ARE



Overall Credits:
47,434

BY THE NUMBERS

PD credits earned through:

PD Week: 30,805

PSMW Winnipeg: 2,190

Webinars: 1,023

E-Learning Course: 322

Our 14 Chapters

PD Credits Earned in 2016-2017

1	Victoria:	2,957	6	Ontario:	1,295	11	SE N.B.:	254
2	Vancouver:	40	7	Capital:	2,724	12	Halifax:	438
3	Edmonton:	1,776	8	Montreal:	485	13	P.E.I.:	361
4	Regina:	172	9	Quebec:	1,639	14	St. John's:	654
5	Manitoba:	116	10	Fredericton:	183	✓	Total Chapter Credits Earned:	13,094

PD WEEK 2016

Inspiring Collaboration

It is fitting that Collaboration was the theme for PD Week 2016 as the organizing committee and the national office combined to put together a rewarding and unforgettable week.

For the first time at PD Week, fmi⁺igf incorporated the Government of Canada Key Leadership Competency profile, as referenced in the Treasury Board guidelines for financial officer competency-based management.

With more than 4,500 participants on hand for the four-day event, it allowed fmi⁺igf to make the week even more pertinent to those in the public sector.

PD Week 2016 included keynote speakers Guy Laflamme, who spearheaded Canada 150 celebrations, fitness guru Tony Greco and Sir Michael Barber, who is credited with spreading the gospel of deliverology to governments all over the world.

Speed Mentoring took off at a record pace as 35 senior level financial officers provided 15 minutes of career advice in 186 individual sessions to up and coming professionals.

In the exhibit hall, attendees took part in replicating the Parliament Buildings out of mega-blocks courtesy of Habitat for Humanity Canada, with the final blocks laid by PD Week chairs Peter Syntetos and Sylvie Tanguay.



The 2016-2017 FMI board of directors (front row from left) president Martha Okot Thomas, Barb Kelly, Linda Dow, Derek Cock-burn and Jean Labelle. (Middle) Athena Dino and Jim Randall. (Back row) Shawn Johnson, Jonathan Hood, Caroline Desilets (national events coordinator from the national office) and CEO Christopher Egan.

PSMW 2017 WINNIPEG

30th edition dances up a storm

You could say PSMW 2017 Winnipeg, the 30th anniversary of fmi^{igf}'s Public Sector Management Workshop, danced its way to success.

The two-day event - Collaboration, Growth, Renewal - not only featured keynote speakers like Bill Mathews, Comptroller General of Canada, Habitat for Humanity president and CEO Mark Rodgers and fmi^{igf} president Martha Okot Thomas, it also showcased Manitoba's unique culture and heritage with performances from local dance groups La Troupe Jeunesse and Walking Wolf (First Nations Contemporary Dance Troupe), who entertained the 200-plus participants.

Not only was there a focus on the Government of Canada Key Leadership Competency profile, the key competencies from the Manitoba government were also utilized.

Co-chairs Robyn Van Vliet and Lynn Cowley were supported by members of the organizing committee: Allison Zimmer, Trevor de Ryck and Athena Dinos.



An Aboriginal hoop dancer performs at PSMW 2017 in Winnipeg in May.

As webinars expand, so does e-journal

The fmi^{igf} series, Expand Your Horizons, celebrated its eighth year by adding nine new webinars in 2016-17.

Last year's program reached more than 1,200 participants who signed up to learn more about the various competencies relevant to their work.

The most popular topics for the webinars were innovation and behavioral competencies, which included understanding executive needs, women in leadership, management of team conflict, procurement, and the new infrastructure bank.

Besides offering articles of interest to those in the public sector, the fmi^{igf} e-journal, Connection, continues to play a key role in keeping all our chapters in tune to what each is doing. It is also an important forum for keeping the chapters abreast of what is going on at the national office.

ASPIRING LEADERS NETWORK

Empowering tomorrow's leaders today



Founded in 2014, the Aspiring Leaders Network is a flourishing youth network for accounting and finance professionals.

Today, the ALN, which has chapters in Ottawa, Victoria and Halifax, boasts more than 500 national participants who benefit from having access to a host of industry insiders.

This included in-person training during ALN's signature event at PD Week 2016 from Kevin Radford, Assistant Deputy Minister, Real Property Branch, Public Services and Procurement Canada, about key aspects in leadership, and from Mike Mילו, Director General, Internal Audit and Evaluation Bureau & Chief Audit Executive and Head of Evaluation, Treasury Board of Canada Secretariat, about relationology.

On-demand training was provided in the form of a webinar from Andre Morency, retired Senior Assistant Deputy Minister, Corporate Services and Chief Financial Officer, Transport Canada, about effective management of team conflicts.

These ALN-specific training sessions combined to attract close to 380 participants.

As ALN looks to grow in 2017-18 by potentially having representatives reach out to universities and other youth networks, it will continue to be the definitive organization for young



Wendy Shih, Jack Diao and Jean Farley from the Aspiring Leaders Network.

accounting and finance professionals, providing fantastic networking and

professional development opportunities.