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Inspire.  
Empower.

**2021 - 2022**  
**ANNUAL REPORT**



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## MESSAGE FROM THE NATIONAL BOARD CHAIR Derek Cockburn

2022 brought us together for our first in-person opportunities in two years, as nearly 200 delegates attended our Public Sector Management Workshop 2022 (PSMW) **Shifting Tides: Disruption, Diversity and Digital** in Halifax in June. On the margins of this event, we continued with our focus on collaboration, as the National Board and the membership of the Chapter Advisory Council (CAC) took time to meet and form three critical sub-committees to work on the following topics:

- 1) Corporate Branding Review;
- 2) Chapter Affiliation Agreement Renewal; and,
- 3) Chapter Onboarding to our new Customer Relations Management System (MPower).

Since then, these sub-committees have been working diligently and will be providing an in-person report out at a joint Board-CAC meeting when we all come together in November during PD Week 2022. This work is an example of how our organization is applying best governance practices to ensure the future success for fmi\*igf!

As we wind down calendar year 2022, all eyes will be on our return to an in-person PD Week, happening November 22nd to 25th. The theme for this year's event: **Leading the Charge: Accelerating from Innovation to Excellence**, is intended to reflect the aspiration that we can all find ways to leverage the many positives and innovations that came from managing through the pandemic and make sure we make the most of them moving forward. Not held in-person since 2019, this event will also mark our return to the Shaw Centre, where we will be able to welcome more attendees to this wonderful venue in downtown Ottawa.

As fmi\*igf celebrates its 60th Anniversary since its inception in 1962, I am very pleased to share that as a result of the tireless efforts of our small team and the many volunteers, as well as the incredible loyalty of our attendees from coast to coast to coast, none of which we take at all lightly, fmi\*igf has successfully navigated its way along.

On behalf of the National Board of Directors, I can tell you that we are all excited about what lies ahead for fmi\*igf, and are looking forward to continuing to provide our attendee community with leading class programming for 2022/23 and beyond!

Yours truly,

Derek Cockburn, CPA, CGA  
Chair, fmi\*igf Canada



Derek Cockburn  
Chair, fmi\*igf Canada



## MESSAGE FROM THE CEO

**Marty Muldoon**

From its humble beginnings in 1962, fmi.igf has been the marquee provider of learning and development for the public sector financial management community. 2022 marks its 60th Anniversary, an impressive achievement to be sure, but especially for a small not-for-profit organization! As we celebrate this amazing milestone, we do so quite proudly acknowledging that it is largely thanks to the countless volunteers that have passionately given of their time to ensure fmi.igf continues to remain relevant over the past 6 decades!

Like so many industries, the impact of the pandemic has been both challenging and, at the same time, positive in many ways for fmi\*igf. Our Board of Directors led the way, ever mindful of the challenges, navigating them with appropriate care and attention to our planning, our operations, and of course, the safety of fmi\*igf staff, partners, volunteers, and membership/attendees.

I am very proud of our small but mighty National Office Team, they are a highly dedicated group which never wavered in their enthusiasm and focus on providing value to the learning community we so deeply enjoy working with. Their professionalism and expertise directly ensured that fmi\*igf was still able to provide outstanding learning to our community during the most uncertain of times.

In November 2021, fmi.igf held its first ever fully virtual PDWeek, and it was a huge success, providing the most ever number of CPD hours for our learners and attracting the highest number of regional attendees in our long history! We introduced the innovative on-demand option, allowing all participants 3 additional months following the event to watch each of the sessions they had registered for. This feature was so well received we are bringing it back for PDWeek 2022.

In June, we returned to in-person programming hosting PSMW in the beautiful Maritime City of Halifax. The attendance was more than we could have hoped for, and the vibe was palpable! Everyone showed up with a strong sense of excitement and enthusiasm about being able to reconnect with colleagues and take in top tier learning in a live environment once again!

As I look back on this tremendous year, and to what lies ahead, I remain just as excited to be a part of this long standing organization and to have the opportunity to continue connecting with our community and partners and doing my part to ensure fmi\*igf always delivers exceptional professional development for the public sector communities it serves so very well at all levels of government across Canada.

Warmest regards,

Marty Muldoon, CPA, CMA, MBA  
CEO, fmi\*igf



**Marty Muldoon**  
CEO, fmi\*igf





## AS WE LOOKED AHEAD TO 2021-2022

Our focus was on continuing to grow our presence in the digital space and keeping informed of the opportunities to run in-person programming and events. We considered various scenarios to ensure fmi\*igf continued its tradition of offering high-quality professional development to the public sector management community. Given the state of the pandemic, and focused on the health and safety of everyone who participates, we took the decision to host PDWeek21 in a total virtual format. Later, as the protocols relaxed, we were able to return to in-person for the first time since the pandemic began, hosting PSMW in Halifax!

Our 14 local fmi\*igf Chapters also continued to pivot their programming. Some postponed all programming where prudent to do so, while others were able to offer virtual events and keep their local attendees engaged, and open their programs to others from across the Country to those who normally would not have been able to attend when held in person. This remains one of the unintended positives to come from the pandemic. A smaller number of in-person activities were also held as the country saw the relaxing of the gathering restrictions.





## FISCAL 2021-2022 IN REVIEW

Like most organizations, fmi\*igf approached the year very prudently from a financial management perspective. As a result of the pandemic and the ever changing restrictions on public gatherings throughout the fiscal year, fmi\*igf offered a fully virtual PD week in 2021. The delivery format allowed for enhanced opportunities to attend regardless of location, which in turn bolstered regional attendance to its highest level ever and fmi\*igf's national visibility.

The efforts of the Board of Directors and its Committees, the National Office Team, and the unwavering support of our attendees, volunteers, partners & stakeholders were critical to making this success a reality leading to the positive year-end financial position (\$503K surplus).

During the year, in addition to driving the overall strategy for fmi\*igf, the Board of Directors continued with its multi-year strategy of updating the Institute's governance, including the supporting policies and directives. Expanding on these efforts the Board of Directors worked closely with the Chapter Advisory Council to establish subcommittees on FMI branding, Chapter Affiliation Agreement (update), and MPower Chapter on boarding.

The National Office Team replaced outgoing staff, welcoming Kiran Boga (IT & CRM), Mariana Veloso (Marketing), Brigitte Svarich (Finance & Administration), and Dave Tubbe (National Operations & Sales) bringing with them their expert competencies and skill sets to the team.



### fmi\*igf Webinar Series



### Webinars



### On-Demand Courses



## WHO WE ARE July 1, 2021 – June 30, 2022

### BOARD OF DIRECTORS :

#### Chair

Derek Cockburn, CPA, CGA  
Victoria, BC

#### Vice Chair

Gary Wuschnakowski  
Toronto, ON

**Secretary-Treasurer & Chair,  
Finance & Audit Committee**  
Sherry Sharpe, MBA, CPA, CGA  
Ottawa, ON

**Governance Director & Chair,  
Governance & Nomination  
Committee**  
Athena Dinos CPA, CGA, MBA,  
B.Comm (Hons)  
Winnipeg, MB

**Central Regional Director**  
Dan Maloley, CPA CMA, CIA  
Ottawa, ON

**Eastern Regional Director**  
Valeri Perry  
Fredericton, NB

**Western Regional Director**  
Jeanette Stead, CPA, MBA  
Edmonton, AB

**CEO**  
Marty Muldoon, CPA, CMA, MBA  
Ottawa, ON

### FINANCE & AUDIT COMMITTEE:

#### Chair

Sherry Sharpe, MBA, CPA, CGA  
Ottawa, ON

Derek Cockburn, CPA, CGA  
Victoria, BC

Marie-Josée Bisson, CPA, CMA  
Levis, QC

Calvin Wat CPA, CGA  
Winnipeg, MB

Meghan Gaudet, CPA  
Moncton, NB

Rodney Chase CPA, CMA  
Fredericton, NB

### CHAPTER ADVISORY COUNCIL:

Chair .....	Adam Taylor
Capital (Ottawa/Gatineau) .....	MJ Quraishi
Edmonton .....	Ramola Goguen
Fredericton .....	Madison Spragg
Manitoba .....	Liza Pablo
Montreal .....	Martin Dussault
Nova Scotia .....	Mike Haley
Ontario .....	Indira Ramdhan
Prince Edward Island .....	Melonie MacAusland
Quebec .....	Nicolas Delisle
Regina (Saskatchewan).....	Brent Appel
St. John's .....	John Martin
South-East New Brunswick .....	Valmond Bourque
Vancouver .....	Carlton Gee
Victoria .....	Cheryl Fletcher

### NATIONAL OFFICE:

#### CEO

Marty Muldoon, CPA, CMA, MBA

**Manager, Finance & Administration**  
Brigitte Svarich

**Senior Director**  
Terry Horsman

**Program and Content Manager**  
Gosia Skrobuten

**Marketing Manager**  
Mariana Veloso

### EVENT COMMITTEE VOLUNTEER CHAIRS:

#### PD Week21:

Chair Daniel Vanier  
Vice-Chair Nicole Zywicki  
Past Chair Jennifer Sward

#### PD Week22:

Co-Chair Nicole Zywicki  
Co-Chair Daniel Vanier  
Strategic Advisor Jennifer Sward

#### PSMW22:

Co-Chair Dave MacDougall  
Co-Chair Susan Webber

#### PSMW23:

Co-Chair Brent Appel  
Co-Chair Mike Pestill

**Director, National Operations**  
Val Kelly

**Operations Specialist**  
Jill Peters

**Registration Coordinator**  
Silvia Villon

**IT & CRM**  
Kiran Boga

**National Operations & Sales**  
Dave Tubbe

### GOVERNANCE & NOMINATION COMMITTEE:

#### Chair

Athena Dinos CPA, CGA, MBA,  
B.Comm (Hons)  
Winnipeg, MB

Valeri Perry  
Fredericton, NB

Jeanette Stead, CPA, MBA  
Edmonton, AB

Dan Maloley, CPA, CMA, CIA  
Ottawa, ON

Brent Appel, CPA, CMA, PMP  
Regina, SK

Melinda Pedersen, CPA, CMA  
Fredericton, NB





## A SPOTLIGHT ON PDWeek 2021 & PSMW 2022

In 2021, the pandemic continued to disrupt the event industry. This disruption had fmi\*igf, like so many other organizations, relearning and rethinking everything from business models and sponsorships, to event technology and content delivery.

The year began with great optimism for a return to in-person for our flagship event PD Week, however with the continued uncertainty, and the health and safety of our participants a top priority, the decision to move to a fully virtual event was the only logical choice. This would mark the first time in its 45-year history that PD Week would be delivered virtually, while at the same time,

making the 2021 theme of **Envision 2021: Together We Can**, more appropriate than ever.

With the challenge ahead for a fully virtual event, the fmi\*igf volunteer community along with our national team, worked hard to prepare. The results were beyond our expectations, not only was PDW21 our most successful event, offering the highest overall attendance (4,100), number of learning days offered (13,458), as well as total verifiable learning hours (131,865), the new format also allowed the PD Week brand to be showcased well beyond the NCR (National Capital Region) resulting in over 400 new regional attendees taking part!

### HIGHLIGHTS

#### PD Week 2021 November 22-26, 2021 Envision 2021: Together We Can

We were delighted to have Mr. Roch Huppé, the Comptroller General of Canada, as the Honorary Chair for 2021 and his keynote address was an informative view on the Future of Comptrollership and one of the highest attended sessions of the week.

The Conference program consisted of keynotes, panel discussions, concurrent sessions, totalling 44 verifiable CPD hours as well as our special Executive sessions and the ever-popular CFO/CAE Speed Mentoring program.

A special feature of the all-virtual event was **Envision Kick Off Monday**. The special bonus day was made available to all delegates, whether a full access pass or one-day pass holder.

These CPD eligible sessions included topics such as the Accrual Budgeting Project, Programme Management Framework, Business Process Analysis & Costing (BPAC Techniques), Role of Leaders in Organizational Change and Whistleblowing: Supporting a “speak-up” culture to name just a few.

Each themed day provided high calibre content within the “Hot Topics”, “Leading Practices in Comptrollership”, “Technology, Innovation, and Experimentation”, and “Mobilizing People” tracks.

Keynotes included: Canadian icon Rick Mercer, Comptroller General of Canada, Roch Huppé, Expert on Resiliency and Workplace Wellness, Dr. Robyne Hanley-Dafoe, as well as Inclusivity and Diversity expert Dr. Ivan Joseph to name but a few.

#### Keynotes included:



Canadian Icon  
Rick Mercer



Comptroller General  
of Canada  
Mr. Roch Huppé



Expert on Resiliency  
and Workplace Wellness  
Dr. Robyne Hanley-Dafoe



Inclusivity  
and Diversity expert  
Dr. Ivan Joseph



# A SPOTLIGHT ON PDWeek 2021 & PSMW 2022

## PDWeek 2021 HIGHLIGHTS...

A sampling of additional sessions included:

● **Data is the key to Transformation:**

- Anil Arora, Chief Statistician of Canada, Statistics Canada



Anil Arora

● **Lessons Learned from the Pandemic – thoughts on risk and leadership:**

- Paul Glover, President, Shared Service Canada



Paul Glover

● **Future of Work a CFO Fireside Chat:**

- Anick Ouellette, Assistant Deputy Minister and Chief Financial Officer (CFO), Corporate Planning, Finance and Information Technology, Global Affairs Canada, Government of Canada
- Doug McConnachie, Chief Financial Officer and Assistant Deputy Minister, Corporate Management, Innovation, Science and Economic Development (ISED), Government of Canada
- Karen Robertson, Chief Financial Officer, Employment and Social Development Canada, Government of Canada



Anick Ouellette



Doug McConnachie



Karen Robertson

● **Ransomware: Building a playbook to survive a ransomware attack:**

- Peter Morin, Partner National Cybersecurity Leader, Grant Thornton



Peter Morin

● **Being a leader in times of change:**

- Geneviève Desautels, Leadership development expert, Amplio Strategies, Inc.



Geneviève Desautels

With the virtual format, we also were able to offer a most unique daily “NewsDesk” feature over the course of the event, during which our very own special PD Week new anchor Darryl Prail offered daily highlights of the program, interviewed numerous volunteers, attendees and speakers and provided all watching virtually with a much more intimate inside look at PD Week.

Finally, and it was an fmi\*igf first, we offered our attendees the opportunity to watch any session they were registered for as many times as they wanted on-demand for the 3 months following PD Week. This feature was hugely appreciated by our participants because it afforded everyone the ability to take in all the concurrent sessions in their package, and watch their entire registration package at their own pace to maximize their learning potential.

## Top Sponsors included:



Think Ahead



THE RIGHT DOOR







# A SPOTLIGHT ON PDWeek 2021 & PSMW 2022

## HIGHLIGHTS

### PSMW 2022 Halifax, NS, June 6-7th 2022 Shifting Tides, Disruption, Diversity & Digital

fmi\*igf's 2022 edition of the Public Sector Management Workshop (PSMW) marked the return from a two-year hiatus from live events. The two day learning event was hosted by our Nova Scotia Chapter in the new state-of-the-art Halifax Convention Centre, and led by our volunteer committee co-chairs, Susan Webber and Dave McDougall.

The team followed the public health and safety guide lines closely during the entire planning process as well as onsite during the event in order to ensure all participants a safe and memorable experience and were elated when the conditions permitted the in-person event to go on!

The results were impressive, with some 200 participants and a total of 1,910 CPD hours earned. The event kicked off with some unique maritime networking opportunities starting with the pre-event welcome reception at the Discovery Centre followed by an amazing evening harbour tour on the Tall Ship Silva following the first day of the event. This unique experience allowed attendees to learn more about the rich history of Halifax, while seeing some of the breathtaking views first hand.

The program included 2 full days of rich content with a mix of keynotes, panel discussion and sessions for a total of 10 verifiable CPD learning hours for each participant.

Day 1 kicked off with Ross Simmonds, CEO of Foundation Marketing as he spoke to **The Evolution Of Work: How AI & Remote Are Changing Everything.**



CEO,  
Foundation Marketing  
Ross Simmonds

A sampling of additional sessions included:

- **“Enriching the Leadership Network: The Building Black Leaders program”** from Executive Director, Strategic Services Branch, Service Canada  
Kathy Lusk



Kathy Lusk

- **A CFO panel on the Challenges and Opportunities resulting from the Pandemic** that included
  - Stéphane Lagacé, Vice-President, Finance and Corporate Services , Atlantic Canada Opportunities Agency (ACOA)
  - Geoff Gatien, CPA, CA, Associate Deputy Minister of Finance and Treasury Board and Controller, Government of Nova Scotia and
  - Jerry Blackwood, Chief Financial Officer, Halifax Regional Municipality



Stéphane Lagacé



Geoff Gatien



Jerry Blackwood

- **The only constant is change: delivering digital services through COVID-19 Beyond**
  - Natasha Clarke, Associate Deputy Minister, Chief Digital Officer, Service Nova Scotia & Internal Services



Natasha Clarke



# A SPOTLIGHT ON PDWeek 2021 & PSMW 2022

## PSMW 2022 HIGHLIGHTS...

- Transforming Finance & Accounting with Intelligent Automation & Process Mining

- Robert Ronberg, Public Sector Lead, UiPath (Canada)
- Jayson Scott, Customer Success Manager, UiPath



Robert Ronberg



Jayson Scott

PSMW closed out with a heartfelt keynote presentation from **Tareq Hadhad, Syrian Refugee and successful Founder & CEO of Peace by Chocolate**. Tareq shared his personal story of the impacts of war, immigration and activism and what can happen when people open their arms and offer kindness in another person's time of need, leaving all with an emotional message that peace truly is beautiful in every language.



Founder & CEO,  
Peace by Chocolate  
Tareq Hadhad

### PSMW's sponsors included:



Think Ahead



National Association of Federal Retirees / Association nationale des retraités fédéraux



We would like to thank the volunteers from the Nova Scotia Chapter for all their hard work, and the participants that showed up full of excitement to be attending the in-person learning event, for making the return of PSMW a huge success.





# PROFESSIONAL DEVELOPMENT ACROSS CANADA: BY THE NUMBERS

*Even with the impacts of the pandemic, fmi\*igf and its Chapters were able to offer our community an impressive number of learning opportunities. Chapters made best efforts to offer as much local learning as they could given the environment and ever evolving restrictions. Two even innovated by joining forces to co-host an event.*

## CHAPTER CPD HOURS:

1	Victoria .....	2,527.0
2	Vancouver.....	0.0
3	Edmonton.....	295.5
4	Regina (Saskatchewan).....	91.5
5	Manitoba .....	188.0
6	Ontario .....	666.0
7	Capital (Ottawa/Gatineau) ..	1,431.0
8	Montreal .....	0.0
9	Quebec .....	2,274.0
10	Fredericton .....	169.0
11	South-East New Brunswick ..	0.0
12	Nova Scotia .....	120.5
13	Prince Edward Island .....	0.0
14	St. John's .....	1,270.5

**Total all Chapters: 9,033.0**



**PD WEEK 2021 CPD HOURS: 131,865.0**

**PSMW 2022 CPD HOURS: 1,910.0**

**WEBINAR CPD HOURS: 750.0**

**COURSE CPD HOURS: 373.5**



**TOTAL  
 CPD HOURS:  
 143,931.5**



## LOOKING AHEAD TO 2022-2023

Looking forward, our strategy is to return to in person programming for PDWeek 2022 at our new chosen facility, the Shaw Centre in Ottawa, which offers the ability for fmi\*igf to revamp and modernize its programming, sponsorship opportunities, networking activities, and overall attendee experience.

PSMW 2023 is also well under development and will be held in-person in the beautiful Prairie city of Regina in June 2023. The planners are hard at work, and are taking full benefit of the event planning work previously done for PSMW 2022. Be sure to check in over the fall/winter 2022/23 for information at: <https://fmi.ca/psmw/>

The Board will be holding its election at its annual AGM in November 2022 during PD Week, and continues its excellence strategy, focusing on governance and policy work. This important pursuit will help ensure the longevity, credibility, and transparency of the organization for the long-term.

The national office team remains focused on providing outstanding caliber learning and development events and activities, and to strengthening strategic partnerships and relationships within the financial management/audit/man-ager/executive sectors at all levels of government across Canada.





**fmi\*igf**  
Educate. Inspire. Empower.

## ALL ABOUT fmi\*igf

The Financial Management Institute of Canada (fmi\*igf) has been providing professional development to members of the public sector since 1962.

As a nationally recognized, not-for-profit volunteer association, fmi\*igf offers national learning events, cutting edge online courses, along with webinars that focus on relevant issues in financial management.



Our mission is to educate,  
inspire and empower





**Addendum**  
**AUDITED FINANCIAL STATEMENTS**