



Educate
Inspire
Empower

2022 - 2023 ANNUAL REPORT

OUTLINE

- 3** MESSAGE FROM THE NATIONAL BOARD CHAIR
- 4** MESSAGE FROM THE CEO
- 5** FISCAL 2022-2023 IN REVIEW
- 6** WHO WE ARE
- 7** A SPOTLIGHT ON PDWeek 2022 & PSMW 2023
- 11** PROFESSIONAL DEVELOPMENT ACROSS CANADA:
BY THE NUMBERS
- 12** LOOKING AHEAD TO 2023-2024
- 13** ALL ABOUT fmi*igf
- 14** AUDITED FINANCIAL STATEMENTS

MESSAGE FROM THE NATIONAL BOARD CHAIR Derek Cockburn

November 2023 marks the end of my four-year term as Chair of this outstanding learning and development organization, and a great opportunity to reflect on the remarkable accomplishments we achieved during this period.

In 2020, we went through some significant changes. We brought on a new CEO, who has been instrumental in leading us to where we are today. An early example of our vision and creativity was the development and introduction of our first-ever virtual speaker series. As the face-to-face learning world came to an abrupt stop, this new product offering allowed us to continue to provide our members with the accessible high-quality programming that they have come to expect from fmi*igf.

The following year we took the logical next step, in terms of learning how to survive and thrive during the pandemic, when we created our first ever fully virtual PD Week. This new approach allowed us to provide more outreach, resulting in a significant increase in our PD Week attendance by delegates from outside of the National Capital Region. We also introduced an on-demand feature allowing registrants three months following the event to watch their entire session package at their own pace, resulting in even more learning value associated with our annual flagship event.

2022 saw the return to in-person events with both PSMW in Halifax and PD Week at the Shaw Centre in Ottawa. Both were very well attended, with PD Week seeing its highest attendance ever in its long-storied history, and we retained the popular on-demand feature supporting maximum learning value!

In 2023, we continued our focus on collaboration. The National Board, National Office Staff and our 14 Chapter representatives on the Chapter Advisory Committee (CAC) came together like never before to work on our raison d'être. This effort resulted in the first major revision to the Chapter Affiliation Agree-

ment (CAA), which was formally approved and unanimously signed off at our June PSMW in Regina. We also moved forward on strengthening our integrated strategic planning efforts with a long-term view of increased regional access to our learning offerings.

On a final note, I would like to thank the entire fmi*igf community for helping to make my term such an interesting and exciting time! I am pleased to state that fmi*igf is doing well coming out of the past few years and, looking forward, I can see even more great results to come for our organization, reinforcing that we are the leading source of financial management professional development (and networking) for all levels of government across this amazing country.

Yours truly,

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



Derek Cockburn
Chair, fmi*igf Canada

MESSAGE FROM THE CEO

Marty Muldoon

Now in its 61st year of service, fmi*igf remains the longest standing most impactful provider of learning and development for the public sector financial management community. We do not take this accolade lightly, and have worked very hard to be the best at what we do, so that you, our community, can be supported in your pursuit of being the best at what you do!

One of the most important differentiators that has set fmi*igf apart over its impressive history is its engagement with the community. It has never deviated from its roots, working closely with countless volunteers that passionately give of their time and energy to ensure fmi*igf's programming remains the most Challenging, Inspiring and Career Advancing! Our informal motto of "built by the community - for the community" dates all the way back to our earliest origins in 1962 when a small group of federal employees came up with the idea of organizing L&D opportunities for the FM community of practice, and the rest as they say is history!

Fast forward, November 2022 marked the much awaited return to an in-person PDWeek in Ottawa's Shaw Centre and the community turned out in record attendance numbers. We also purposely retained the on-demand option (three months to watch at your own pace) in order to support our growing following of regional learners, as well as, all who could not otherwise attend in-person in Ottawa. Regional access has grown significantly over the last few years and will continue to be a major focus of our organization along with our 14 Chapters located across the Country.

In June 2023, we hosted our PSMW in the beautiful prairie city of Regina, Saskatchewan, where attendees were treated to perfect weather and an excellent in-person two day program. Delegates came from a diverse range of departments from all levels of government, and it was clear that the need and desire to engage and share was so welcomed!

Our not-for-profit organization has worked incredibly hard over the past three years to adapt and thrive in the ever changing world we all experienced. I am very proud of the challenges we have overcome, as well as, our relentless pursuit of providing L&D excellence to the community we are so proud to support.

It continues to be a great honor for me to be able to work with such a dedicated and passionate National Office Team, National Board, Volunteers and Stakeholders to give back to our community, and do my part to ensure fmi*igf always delivers the most exceptional professional development for the public sector FM community at all levels of government across Canada.

Warmest regards,

Marty

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



Marty Muldoon
CEO, fmi*igf

FISCAL 2022-2023 IN REVIEW

Fmi*igf approached the year with a great deal of optimism and excitement. Our focus was on continuing to extend our National and local Chapter offerings in a healthy mix of virtual and in-person programming and events, all with a goal of bringing high calibre L&D to all levels of government, and in particular, to those who would not otherwise have access to attend in-person. Most of our 14 Chapters were able to return to more normalized operations, adapting delivery (in-person and virtual events) to their unique local realities.

For the first time since 2019, both National events, PDWeek 2022 and PSMW 2023, were held in-person once again, offering attendees outstanding learning and networking opportunities to re-engage with the community. PDWeek also retained the popular on-demand option in 2022, which allowed

for enhanced opportunities to attend regardless of location. This in turn bolstered regional attendance to its highest level to date and directly enhanced fmi*igf's national visibility. This expanded reach also helped with registration revenue.

PDWeek 2022 was the most successful in our organization's history. We would like to acknowledge the efforts of the Board of Directors (and its Committees), the National Office Team, the volunteers, and the stakeholders all of whom contributed to making this success a reality! fmi*igf ended the year with a surplus of \$547K.

The National Office Team added to its staff complement, welcoming Chelsie Vuorensyrja to the new role of Administrative Coordinator.



WHO WE ARE July 1, 2022 – June 30, 2023

BOARD OF DIRECTORS :

Chair - Derek Cockburn, CPA, CGA
Victoria, BC

Vice Chair - Gary Wuschnakowski
Toronto, ON

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

Secretary - Shawn Melnychuk, CA
Sherwood Park, AB

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 -
Adam Taylor, CPA, CGA
Victoria, BC

Outreach - Doug McConnachie, CA
Chelsea, QC

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

EVENT COMMITTEE VOLUNTEER CHAIRS:

PD Week22:

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

PSMW23:

Chair Mike Pestill
Committee:
Brent Appel
Sean Gottschall
Brent Nadon

CHAPTER ADVISORY COUNCIL:

Chair	Ramola Goguen
Capital (Ottawa/Gatineau)	Lisa Allen
Edmonton	Ramola Goguen
Fredericton	Madison Spragg
Manitoba	Liza Pablo
Montreal	Martin Dussault
Nova Scotia	Dave MacDougall
Ontario	Indira Ramdhan
Prince Edward Island	Melonie MacAusland
Quebec	Nicolas Delisle
Saskatchewan	Brent Appel
St. John's	John Martin
South-East New Brunswick	Valmond Bourque
Vancouver	Carlton Gee
Victoria	Neil Philadelphia

NATIONAL OFFICE:

CEO
Marty Muldoon, CPA, CMA, MBA

Director of Finance and Corporate Services
Brigitte Svarich

Administrative Coordinator
Chelsie Vuorensyrja

Senior Director
Terry Horsman

Program and Content Manager
Gosia Skrobuten

Marketing Manager
Mariana Veloso

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

Director, National Operations
Val Kelly

Operations Specialist
Jill Peters

Registration Coordinator
Silvia Villon

IT & CRM
Kiran Boga

Chapter & Event Services Coordinator
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 2022 & PSMW 2023

PD Week 2022 not only represented a much-anticipated return to in-person events, but also the return to the World-Class Shaw Centre in the nation's Capital for the first time since 2015!

The facility was abuzz with motivational and inspirational activity for 4 straight days including:

- Top caliber Keynote speakers & high-quality learning sessions
- Executive participation with our Executive Program as well as CFO/CAE Speed Mentoring
- Highly interactive networking breaks and daily receptions daily.

All activities were designed to create an exceptional delegate event experience, while continuing to educate, inspire and empower!

With three ways to take advantage of PD Week 2022: in-person only, on-demand only, and in-person with on-demand, the results garnered a total of just under 4700 individual registrants– the most in the history of PD Week.

This included just over 3000 in-person, as well as 1400 on-demand only participants with approximately 390 of these participants from outside of the NCR.

The Executive program saw just over 240 senior level executive participants, making it the highest attended since it's inception.

The overall results included 6,279 delegate days - 48,519 hours of verifiable CPD learning.

HIGHLIGHTS

PD Week 2022 - November 22-25, 2022

Leading the Charge: Accelerating from Innovation to Excellence!

We were pleased to welcome Monia Lahaie, Assistant Comptroller General for the Financial Management Sector within the Office of the Comptroller General (OCG) as our 2022 Honorary Chair.

Attendees were welcomed with a special motivational video message from Ms Lahaie to kick off each morning which truly enforced this year's theme of "Leading the Charge: Accelerating from Innovation to Excellence!"

The Conference Agenda included an incredible variety of keynotes, panel discussions as well as concurrent sessions, totalling a maximum of 42 verifiable CPD hours. In addition to this stellar program, the much anticipated Executive Program, as well as the ever-popular CFO/CAE Speed Mentoring program returned in-person as well to the delight of participants.



Assistant Comptroller General for the
 Financial Management Sector within the
 Office of the Comptroller General (OCG)
 Monia Lahaie
 PD Week 2022 Honorary Chair

The format once again included 4 information packed days under the themes of "Hot Topics", "Leading Practices in Comptrollership", "Technology, Innovation, and Experimentation", and "Mobilizing People" tracks.

A few samples of CPD eligible sessions for 2022 included:

- Teleworking and Ethics
- A Panel discussion on Diversity and Inclusion
- The Past, Present and Future of Financial Management Transformation
- The future skills crisis: How skills can unlock strategy and help win the war for talent
- The Future of Financial Management and Internal Audit
- Leading Recovery: The Evolving Role of the CFO
- Robotic and Intelligent Process Automation
- Accounting Standards Update
- Measuring Productivity in the Public Sector

A SPOTLIGHT ON PDWeek 2022 & PSMW 2023

PDWeek 2022 HIGHLIGHTS...

To kick off the event, Keynote speaker, Hamza Khan, a world-renowned Future of Work expert spoke about navigating an always-on “new abnormal” characterized by hybrid work, endless disruption, and constantly shifting public behaviors and expectations.



World-renowned
Future of Work Expert
Hamza Khan

Other Keynotes included: Amy Karam, Global Competitive Strategist, Shaun Boothe, an award-winning hip-hop artist, TEDx speaker, and creator of ‘The Unauthorized Biography Series, Stuart Beare LGen (ret’d), Strategic Advisor, Accenture and Jean-François Ménard Mental Performance Coach and Bestselling Author to name just a few.

A sampling of additional sessions included:

- **Economic and Fiscal Update:**

- Kevin Page is the founding President and CEO of the Institute of Fiscal Studies and Democracy at the University of Ottawa



Kevin Page

- **Shared Services Canada – An Enterprise Approach to Cyber Security:**

- Sony Perron, President, Shared Services Canada



Sony Perron

- **Trust and Credibility in Complex Costing:**

- Derek Armstrong CFA, Director General, Costing, Investment Planning and Approvals, Department of National Defence, Government of Canada



Derek Armstrong

Other Keynotes included:



Global Competitive Strategist
Amy Karam



Mental Performance Coach and
Bestselling Author
Jean-François Ménard



Strategic Advisor, Accenture
Stuart Beare LGen (ret’d.)



Award-winning hip-hop artist,
TEDx speaker, and creator
of ‘The Unauthorized
Biography Series
Shaun Boothe

Top Sponsors included:

GOLD PARTNERS



SILVER PARTNERS



BRONZE PARTNERS



A SPOTLIGHT ON PDWeek 2022 & PSMW 2023

HIGHLIGHTS

PSMW 2023 Regina, SK, June 5-6th 2023

"You Can See The Future From Here"

The Public Sector Management Workshop (PSMW) moved west to the prairies for the 2023 edition, hosting an exceptional 2-day learning event at the DoubleTree by Hilton, Hotel & Conference Centre in beautiful downtown Regina, SK.

The planning committee, led by co-chairs, Brent Appel, Mike Pestill and Honorary Chair, Veronica Gelowitz were instrumental in the shaping of what truly was an exceptional program.



Deputy Minister, Ministry of
Environment with the Government
of Saskatchewan
Veronica Gelowitz
PSMW 2023 Honorary Chair

The event offered thought provoking keynotes, panel discussions and sessions for the opportunity to earn a total of 10 verifiable CPD learning hours for each participant. With 155 delegates in attendance, this allowed for a total of 1,460 CPD hours earned.

The event kicked off with a truly awe-inspiring keynote by Alvin Law.



Professional Speaker
Alvin Law

A victim of the infamous morning sickness medication, Thalidomide, and born without arms, Alvin challenges his audience members to examine their current perceptions of themselves, other people, and the world around them to learn how to be a successful, compassionate, positive, and engaged human beings that leave the world a better place than how they found it.

Through his presentation **"Alvin's Laws of Life"...5 Steps to Successfully Overcome Anything!"** he truly set the tone for not only the day, but the entire event!

A sampling of additional sessions included:

- **The Future of Ethics when Viewed by Multiple Lenses**

- Richard Arthurs, Partner, Enterprise Risk Services and National Internal Audit Services Leader, MNP



Richard Arthurs

- **Enterprise Leadership**

- Mark McLoughlin, Former Deputy Minister of Advanced Education and 3-time Grey Cup winner; President and CEO of Kootenay Savings Credit Union (KSCU)



Mark McLoughlin

- **Panel: People Strategies in a Disruptive Labour Market**

- **Moderator:**

James Barr, Partner, Advisory Services, KPMG Canada



James Barr

- **Panelist(s):**

Raelynn Douglas, Executive Director, Drug Plan & Extended Benefits Branch SK Ministry of Health

Darcy Smycniuk, Assistant Deputy Minister, Training and Employer Services, SK Ministry of Immigration and Career Training

Pat Bokitch, Assistant Chair, Centres of Excellence, SK Public Service Commission



Raelynn Douglas



Darcy Smycniuk



Pat Bokitch

A SPOTLIGHT ON PDWeek 2022 & PSMW 2023

PSMW 2023 HIGHLIGHTS...

- **Hello to the Future: Lessons on Transformation from the Government of Alberta's 'One Government Experience' (1GX) Program**

- Moderator:

Mike Pestill, Chair of the PSMW 2023 Organizing Committee



Mike Pestill

- Speaker(s):

Laura Wood, Partner, ERP Transformation, Government & Public Sector, PwC Canada

Erika Borgersen, Manager in the Workforce of the Future practice, PwC



Laura Wood



Erika Borgersen

The closing Keynote from LGen (retired) Stuart Beare offered a very inspiring perspective at those that support us in our personal and professional journeys daily.

"Mission, Team, Family, Me – being and seeing the parachute packers in our lives..."

allowed reflection with the audience on mission, team and family in ways that are relatable to the incredibly important work, organizations, teams, and missions they lead and enable.



Strategic Advisor, Accenture
Stuart Beare LGen (ret'd.)

Special thanks to the volunteers from the Saskatchewan Chapter for their tireless efforts in helping shape an exceptional 2-day program.



- **Panel: Working with the Elected**

- Moderator:

Doug Moen, Executive-in-Residence, Johnson Shoyama Graduate School of Public Policy



Doug Moen

- Panelist(s):

Kevin Doherty, Managing Director, Saskatchewan, Prairie Sky Strategy

Dr. Louise Greenberg, Former Executive-in-Residence, JSGS



Kevin Doherty



Dr. Louise Greenberg

PSMW's sponsors included:



Think Ahead



CHARTERED PROFESSIONAL ACCOUNTANTS CANADA
COMPTABLES PROFESSIONNELS AGRIÉS CANADA



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. Some Chapters innovated by joining forces to co-host an event.*

CHAPTER CPD HOURS:

1	Victoria	3,070
2	Vancouver.....	16
3	Edmonton.....	275
4	Saskatchewan	137
5	Manitoba	175
6	Ontario	2,582
7	Capital (Ottawa/Gatineau) ..	0
8	Montreal	418
9	Quebec (QC & Montreal)	2,410
10	Fredericton	162
11	South-East New Brunswick ..	390
12	Nova Scotia	0
13	Prince Edward Island	—
14	St. John's	401
	St. John's & PEI	1,380

Total all Chapters: **11,834**

PD WEEK 2022 CPD HOURS: **48,519**

PSMW 2023 CPD HOURS: **1,460**

COURSE CPD HOURS: **112**



**TOTAL
CPD
HOURS:
61,925**

LOOKING AHEAD TO 2023-2024

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 and National Office worked closely with the Chapter Advisory Council to establish project subcommittees on MPower, Chapter on-boarding, FMI branding, and updating the Chapter Affiliation Agreements:

- fmi*igf successfully concluded its customer relations management project implementation, bringing all National and 12 of 14 Chapter event registration activities onto MPower. This new CRM platform is now being used to manage registration activities everywhere except Quebec, and includes a user friendly attendee portal, payment, and attendee self-access to their CPD certificates, as just a few of the integrated functions.
- fmi*igf also embarked on an ambitious project aimed at refreshing its customer-facing brand and marketing with the expectation of launching the new look and feel early in 2024! This project is one of the key foundational elements in fmi*igf's continuous efforts to evolve and remain fresh and relevant.
- Finally, the fully refreshed and updated Chapter Affiliation Agreements were unanimously concluded with an official signing ceremony held in Regina in June on the margins of PSMW 2023!

Each of these projects is foundational to fmi*igf's go-forward strategy of building on our market presence in both the National Capital Region, as well as, each of our Chapter markets across Canada. The refreshed brand will help in that effort as we strive to continue expanding our presence by bringing exceptional learning to the learner.

Looking forward, the program for PDWeek23 is already almost totally built and locked down. It is going to be an incredible learning and networking experience with new elements for the in-person delegates. Regional learners from across the country will be able to take it in via the popular on-demand pass option. Follow along at: <https://pdweek.ca/>

PSMW 2024 is also well under development and will be held in-person in the beautiful west coast city of Victoria in late May 2024. 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 2023 during PDWeek, and continues its excellence strategy, focusing on strengthening the Brand and the health of all Chapters. This important pursuit will help ensure the nation-wide market presence 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/management/executive sectors at all levels of government across Canada.



CHALLENGING. INSPIRING. CAREER ADVANCING.

NOVEMBER 21 - 24
SHAW CENTRE OTTAWA ON

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