

2018 – 2019

ANNUAL REPORT

**Educate.
Inspire.
Empower.**

MESSAGE FROM OUR PRESIDENT

Derek Cockburn. CPA, CGA

2019 proved to be a busy year at fmi*igf! The year began with PSMW in Richmond, British Columbia at the River Rock Convention Center. The event focused on “Hot Topics” and brought speakers together from a variety of sectors across the province. The event proved to be a huge success due to the gallant efforts of the National Office Staff and the PSMW2019 Organizing Committee. Congratulations to all on a job well done!

This year also saw our members come together in Gatineau for PD Week under the theme of “Let’s Engage”. Once again, the PD Week Organizing Committee and the National Office Staff outdid themselves in achieving another ever so successful event that was enjoyed and appreciated by our members. Nearly 4,300 people came through the doors over the course of the five days. Kudos to everyone involved in organizing this amazing event!

Our organization itself went through some significant transition. With the departure of the previous CEO, the Board has begun its search for a new leader for our National Office. In the interim, Alain Seguin has stepped in as interim CEO. Alain comes to fmi*igf having spent many years in the senior ranks of the federal public service. He is committed to seeing the organization through for the next few months while the search for a permanent CEO is underway. Thank you Alain for stepping in and helping the organization through this period of transition.

The Board itself has also been very busy managing the transition in the office as well as undergoing an intense governance review and transition on the board. One of the critical projects to come out of the governance review was defining the roles and responsibilities of the CEO and Board Chair, as well as a review of the organization’s bylaws, with a specific focus on our election process. The time devoted to this project is well worth the effort, as it will make our organization stronger in the end.

As we look forward to the year ahead, the Board will be focusing on the following key areas: appointing a permanent CEO; enhancing our relationship (and the fmi*igf*igf brand) with strategic partners; and improving communication with our members.

In closing, I encourage our members to come to Halifax on June 8th and 9th to partake in PSMW2020. This year’s theme is “Shifting Tides - Disruption, Diversity and Digital”. These are all concepts that are critical for the development and advancement of financial representatives in the public sector, and will continue to keep fmi*igf in the minds of our members and key stakeholders as a go-to educational and networking partner. *In connection with PSMW2020, we will be holding our Board election on Monday, June 8th.*

As you can see it is an exciting time to be part of the fmi*igf family! Please consider volunteering with us on a committee or board, either nationally or at the chapter level. Your volunteerism is always appreciated!

On behalf of the entire National Board of Directors,

Sincerely,

Derek Cockburn 🍁 CPA,CGA
President fmi*igf Canada



Derek Cockburn. CPA, CGA

PRESIDENT

WHAT'S NEW

To help move fmi*igf into the future and secure our place in the marketplace, fiscal 2018-2019 saw many improvements to our products and the experience of those who engage with us. There is still work to be done, and by building on the foundation established this year Fmi*igf is in a better position to further grow as an organization.

The fmi*igf webinar program was relaunched under a new sponsorship driven model, with a strong focus on content and format. Sponsors included ACCA, SAS, and Grant Thornton and saw an average registration rate of 596 registrants per webinar. The first three webinars resulted in close to 500 net new records to the fmi*igf database.

New websites were launched for PD Week and fmi*igf. The new websites quickly saw an increase in web traffic and created a more cohesive brand experience for those looking to learn more or register for our various products. Content on the sites was streamlined and a new Chapter interface will be rolled out in fiscal 2019-2020 allowing Chapters to update event and board information, while keeping the look, feel, and quality of the website consistent – further protecting the brand.

A consistent look, feel, and messaging were created and applied to PD Week and PSMW ensuring greater product recognition in the marketplace. In the past, fmi*igf changed branding year over year for each of the flagship events – this change to consistent branding is in line with standard best practices around product marketing and will continue to increase the brand awareness across the financial management community.

Based on outreach with Chapters by National Office in the last fiscal, a Chapter DropBox was created where a number of tools are housed that cover marketing, content, logistics, and sponsorship. National Office will continue to build on this toolkit in the next fiscal to meet the needs of each of the fourteen Chapters.



MESSAGE FROM OUR INTERIM CEO

Alain Séguin

There is no denying that fmi*igf has dealt with some challenges over the course of the last year. Testament to this is my own contract appointment as Interim CEO since the end of October. Notwithstanding the reason for my appointment, I can say that my experience here at fmi*igf in the last few months has been very rewarding.

Seeing the dedication and hard work from all facets of fmi*igf has given me assurance that whatever the obstacles or “drama”, as I call it, the mandate and good work of Fmi*igf will endure and prevail. Whether it's the Board, the National Office staff, the Chapters or event volunteers, I have witnessed tremendous dedication and passion to ensuring that our community continues to be well served in their professional development experience for today and the future.

The highlights of 2019 were the successful PSMW and PDWeek events. The 2019 PSMW in Richmond BC exceeded most expectations with over 180 attendees enjoying an excellent event over a two-day agenda. Preparations for the 2020 PSMW in Halifax are in full flight and it promises to be another excellent event in a spectacular venue at the new Halifax Convention Centre.

The recent 2019 PDWeek was the largest to date with 4,270 paid delegates. Who would have thought that a conference room full of Finance professionals singing at the top of their lungs would be one of the favourite sessions of the Week. Planning for the 2020 PDWeek has already started and is running at full speed with the objective of having many if not most of the speakers booked and on our Web Site by the end of June.

For 2020, ironically enough, one of my biggest objectives will be to say goodbye to fmi*igf as I work to replace myself with a permanent CEO who will continue this institution's critically important and excellent work through continued cooperation and collaboration with its many dedicated stakeholders.



Alain Séguin

INTERIM CEO

WHO WE ARE



BOARD OF DIRECTORS

President, Derek Cockburn, CPA,CGA (September 23, 2019)

Treasurer, Gary Wuschnakowski (December 18, 2019)

Director of Governance, Barb Kelly B.Admin., CPA CMA

Central Regional Director, Dan Maloley CPA CMA, CIA

Eastern Regional Director, Linda Dow CPA CMA, MBA

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

Interim CEO, Alain Séguin

CHAPTER ADVISORY COUNCIL

Chair, Sherry Sharpe MBA, CPA CGA

Capital (Ottawa), Sherry Sharpe
MBA, CPA CGA

Edmonton, Jeanette Stead

Fredericton, Valerie Perry

Manitoba, Cindy Dryden CPA CA

Montréal, Elisabeth Silva

Nova Scotia, Mike Haley

Ontario, Gary Wuschnakowski

Prince Edward Island, Melonie
MacAusland

Québec, Eric Maranda

Regina, Brent Nadon CPA, CMA, MBA

St. John's, John Martin

S.E. New Brunswick, Valmond
Bourque BBA

Vancouver, Carlton Gee BA, CGA, MBA

Victoria, Adam Taylor

WORKING COMMITTEES

PD Week 2018 Chair, Gerry Matthews

PD Week 2018 Vice-Chair, Jennifer Sward

PSMW 2019 Vancouver Co-Chair, Carlton Gee

PSMW 2019 Vancouver Co-Chair, Alain Bisson

NATIONAL OFFICE STAFF

Interim Chief Executive Officer, Alain Seguin

National Marketing & Communications, Jessica
Perreault

National Finance Officer, Danielle Belair

National Events Manager, Val Kelly

National Events Coordinator, Frank Hodgson

National Business Development, Terry Horsman

Administrator, Fmi*igf Capital Chapter, Nurben
Basdemir Bagceli

WHERE WE ARE



OUR 14 CHAPTERS

PD CREDITS EARNED IN 2018 – 2019

1 Victoria: 3,194	5 Manitoba: 254	9 Quebec City: 1688	13 PEI: 432
2 Vancouver: 0	6 Ontario: 1062	10 Fredericton: 256	14 St. John's: 80
3 Edmonton: 325	7 Capital: 2318	11 SE New Brunswick: 312	Total Chapter Credits: 10,510
4 Regina: 133	8 Montreal: 206	12 Nova Scotia: 250	

PD WEEK 2018

Empowering People

PD Week 2018 was all about empowering people. Fmi*igf welcomed over 5,000 participants over the course of five days at the Hilton Lac-Leamy in Gatineau from November 19-23. This year's program included 10 thought-provoking keynotes and 20 engaging streams.

Day 1 kicked off with Laraine Kaminsky discussing why diversity isn't inclusion by explaining that diversity is the mix, while inclusion is making the mix work. Carole Ring, the Day 1 afternoon keynote, an accountant who spoke the language of our community, presented the three P's with her talk Perspective, Personal Values and How to Think Positively Big.

On Day 2, David Colleto challenged the traditional view of millennials in the workforce, and activist and trans-model Geena Rocero shared her harrowing journey as an immigrant moving from the Philippines to the U.S. and how her success also had its drawbacks, especially around fear of acceptance and inclusion. She closed out her talk by sharing the economic and social benefits of inclusion for organizations.

PD Week's Day 3 participants heard from Senator Beverly Busson, the first female RCMP Commissioner, who shared what it takes to be an inclusive leader. Whoohoo Inc.'s Chief Happiness Officer Alexander Kjerulf closed out the Day 3 keynote program with a discussion around why a happy worker is a more productive worker, and that job satisfaction is what you think about your job and happiness at work is what you feel about your job.

Susan Aglukark was the opening keynote for Day 4 and shared her journey to understand her Inuk heritage through a variety of songs and stories. In the afternoon, retired NHL player Doug Smith talked about trauma and how it affects everyone and that some forms of trauma are visible while others are not, but equally debilitating.

Day 5 closed out the conference with an executive panel, moderated by Michele Lajeunesse from IBM and included panelists Yves Bacon, Assistant Comptroller General, Treasury Board Secretariat of Canada and John Walsh, Chief Data Officer, Environment and Climate Change Canada about the need to modernize many aspects of the public sector. Dr. Janet Lapp was the final keynote speaker for PD Week 2018 and closed the show with her talk on the importance of inclusion and provided practical tools to make it a priority.

At the President's Reception, Roch Huppé presented Alain Séguin with the Fmi*igf Lifetime Membership Award for his outstanding work in the financial management community.

PD Week was a success thanks to the outstanding work of the organizing committee, led by Chair Gerry Matthews and Vice-Chair Jennifer Sward.

PSMW 2019 VANCOUVER

Public Infrastructure: Insight to Foresight

Fmi*igf's 2019 edition of the Public Sector Management Workshop (PSMW) was hosted in Richmond by the Vancouver Chapter, led by Carlton Gee, Sarah Tobun, and Alain Bisson. The 243 participants gathered for two days of learning and networking at the River Rock hotel.

The delegate survey saw an average score of 9.2/10 for the question of whether delegates would recommend PSMW to a friend or colleague, supporting the significant amount of positive feedback that was heard onsite.

Day 1 kicked off with an inspiring talk about changing the collective mindset in the public sector to build the workplace of the future by Colleen McCormick - a champion for Intrapreneurs in government and the Director of Connected Communities BC at the BC Provincial Government. Colleen's talk set the stage for a panel she moderated on creating value for citizens. Panelists included Guy Gordon, Executive Director, Innovation & Service Delivery, Province of Manitoba; Urvashi Dhawan-Biswal, Senior Director, Digital Design Branch, Digital Transformation Service Sector, ISED; and, Ericka Stephens-Rennie, Free Agent on assignment at CRA as Team Lead, Future of Work Foresight Team.

The Day 1 morning sessions also included an informative discussion about the path to digital transformation by De'Onn Griffin, Senior Research Director, Gartner, and blockchain in the public sector by Othalia Doe-Bruce, Community Engagement Manager, The Blockchain Hub. The afternoon sessions focused on transformation in the public sector, and participants heard from Monia Lahai, Assistant Chief Statistician, Corporate Services, Statistics Canada; James Moffat, Director of Sales, Western Region, Audit & Assurance, MindBridge Ai; and Rob Meikle, CIO, City of Toronto and a leader in public sector innovation and transformation. The panel was expertly moderated by Chris Moore, the CIO for the Toronto and Region Conservation Authority.

Other sessions on Day 1 included an update on BC's procurement transformation by Erik Wanless, A/Executive Director - Procurement Transformation, Procurement and Supply Division, BC Government, and a presentation on how public sector organizations can run efficient procurements that results in solutions that provide value and minimize risk. Helmut Pastrick, Chief Economist at Central 1 Credit Union closed out the day with a keynote presentation answering whether concerns about Canada's economy slipping into a recession.

Day 2 explored climate change and its impact on the economy in British Columbia through a panel moderated by Karen Tam Wu, A/Director, Pembina Institute, with insights from panelists Matt Horne, Climate Policy Manager, City of Vancouver; Nancy Olewiler, Director and Professor, School of Public Policy, Simon Fraser University; and, Michelle Molnar, Environmental Economist, David Suzuki Foundation.

Chuck Rifici, Chairman & CEO, Auxly Cannabis Group Inc.; Rosy Mondin, CEO & Director, Quadron Canna Tech; and, Peter Guo, MNP Cannabis leader discussed cannabis legalization regulation and what's next for the industry and how Canada took the lead on the distribution of cannabis on the global stage.

PSMW closed with a keynote presentation from Shawn Good, CEO, Prospera Credit Union with a call to action for values-based leadership.

We would like to thank the volunteers from the Vancouver Chapter for all of their hard work making PSMW 2019 a success.



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 an e-journal and webinars that focus on relevant issues in financial management.

**Our mission is to
educate, inspire
and empower.**



Addendum

ANNUAL FINANCIAL REPORTS



fmi  igf[®]

2018-2019 ANNUAL REPORT

fmi.ca 