Top accomplishments: Making a difference at CPA Canada

*We make a difference at CPA Canada by:*
• creating an effective and efficient organization that delivers value to members and stakeholders
• building the culture, capabilities and skills of our team
• ensuring the financial sustainability of the organization

Enhancing member engagement

12,700 followers on Twitter @CPAcanada
26,762 fans of CPA Canada’s official Facebook page
3,067 followers on Instagram
92,266 followers on LinkedIn

CFE Gold Medal winner Lawrence (Qianyu) Zhang shares his winning strategy.
Our employees

On February 1, 2019, CPA Canada received notification from Excellence Canada that, after a comprehensive review of the organization’s Going-for-Silver submission and on-site verification, certification at the Silver level in the Excellence, Innovation and Wellness® (EIW) standard was achieved.

Within CPA Canada we are focused on building the culture, capabilities and skills of our team to better serve our members and stakeholders. Twenty-five employees from all locations serve on the CPA Canada Excellence Council to champion organizational excellence, continual improvement and innovation.
CPA Canada is committed to creating a positive work environment where employees can learn, grow and succeed in their careers.

**Digital training**

- 8 lunch and learn sessions
- 20 financial literacy sessions. Topics included: Are You a Good Financial Role Model?; Effective Tax Strategies; and Fraud Protection

**CEO-led communication initiatives** (e.g. international job shadowing opportunity, ongoing conversation sessions, internal social media network)

**Leadership training**

**Career development and ongoing workshops** (e.g. professional business writing, project management and thinking on your feet)

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CPA Canada was one of three professional accountancy organizations that participated in IFAC’s webinar event to promote empowerment and inclusion of those with disabilities. CPA Canada’s Human Resources department was among the speakers.
CPA Canada’s highly successful Employee Volunteer Program raised over $51,600 for a variety of charitable organizations.

- 222 employee volunteers
- 957 volunteer hours

CPA Canada volunteers from Ottawa, Toronto, Montreal and Burnaby gave back to their communities through the Employee Volunteer Program. Activities included sorting food at the Ottawa food bank, coordinating games for kids in Toronto at the annual Macaulay Sports Day, planting trees and cutting invasive plants on Montreal’s Mount Royal, and cleaning garlic at The Sharing Farm for the Richmond, B.C., community.
Driving organizational excellence

Implementation of ADP’s Workforce Now platform provides a host of human resources functions on one site. The new Me@CPACanada portal allows employees to update information, file attendance, request vacation days, complete performance evaluations and view and/or print pay statements and T4s.

The new online expense system will make processing claims easier and more efficient so employees will receive reimbursement quicker.

CPA Canada advances its digital optimization initiative with the introduction of new Office 365 collaboration tools. This will enable greater communication and collaboration and help transform CPA Canada into a digital workforce.

AWARDS AND RECOGNITION

- 6 International MarCom Awards
- 6 National Magazine Awards: B2B
- 2 Excellence in Financial Literacy Education awards
- 2 ARC Awards
- 1 Certificate of Merit for financial wellness from Excellence Canada
- 1 The Accountant and International Accounting Bulletin award
- 1 Tabbie Award

CPA Canada’s President and CEO Joy Thomas was recognized by the Women’s Executive Network.
Multi-pronged approach to achieving financial sustainability at CPA Canada:

- Investments in human capital
- Creating a culture of collaboration and innovation
- Aligning initiatives with member value
- Less reliance on member dues
- Greater organizational efficiencies and improvements in processes to better serve our members
- Increased member interaction through digital optimization
- Continuously examining the value and impact of product and service offerings to discover efficiencies
Looking forward

CPA Canada must anticipate and respond to the acceleration of multiple business, economic and social trends that create both opportunities and risks for members and the accounting profession.

During these changing and uncertain times, CPA Canada is well-positioned to be a valued and trusted adviser with a focus on helping members successfully navigate change. Our fiscal 2019-2020 business plan identifies three priorities to guide our work and drive enterprise initiatives, projects and programs.

1. Member value
   To help us address the different ways in which member value is created, we’ve identified two perspectives to shape our work:
   - **Direct value**: relates to the provision of products, services and initiatives that meet the needs of our members and empower their leadership.
   - **Indirect value**: relates to CPA Canada activities that leverage the knowledge and expertise of the Canadian accounting profession and the CPA designation through research and public policy work, thought leadership, support for standard setting and international efforts aimed at enhancing the value of accounting and business best practices.

2. Digital optimization
   Enhancing member value also requires embracing a new digital environment. Planned initiatives will help create positive member experiences and a digital-first mindset within the organization. Our focus will be to improve the member and stakeholder experience when interacting with CPA Canada by improving the national website, developing a more robust customer relationship management (CRM) strategy and implementing a new e-commerce system.

3. Financial sustainability
   CPA Canada will drive the financial sustainability of the organization by continuously examining the value and impact of product and service offerings, as well as creating greater efficiencies in its operating model.
Highlights for fiscal 2019-2020

CPA Canada

Foresight
REIMAGINING THE PROFESSION.

Phase 2 of CPA Canada’s Foresight initiative will continue to engage the global accounting community to help advance the future of the profession. This will include establishing a governance model that will ensure the project moves ahead with specific deliverables, outcomes and timelines. Phase 2 will include participation from a wide range of domestic and international stakeholders, including regulators, standard-setters, academics, investors, the accounting profession and others. CPA Canada will continue to support the Foresight initiative under the guidance of the oversight committee.

We will continue with the implementation of our digital optimization initiative to enhance member engagement.

CPA Canada’s multi-year excellence journey, which strives for continual improvement, moves forward with the goal to achieve Gold, and ultimately Platinum-level certification in the coming years.

There will be ongoing promotion of our public policy and advocacy agenda, including CPA Canada’s call for a comprehensive review of the country’s tax system.

To better meet the needs of students and employers, CPA Canada will offer an additional writing of the Common Final Examination (CFE) next year. Starting in 2020, the CFE will be offered in May and September.