

CPA Canada Strategic Framework 2014-15

MISSION

CPA Canada enhances the relevance and value of the CPA profession by acting in the public interest and providing our members with skills and resources to excel

VISION

To be the pre-eminent, internationally recognized Canadian accounting designation and business credential that best protects and serves the public interest

VALUES

- Act with Integrity
- Foster Excellence
- Be Accountable
- Work Collaboratively
- Respect Others

Key Objective 1: Enhance Member and Stakeholder Value

- Build recognition of the CPA profession by creating, supporting and enhancing the products, services and resources available to our members and stakeholders
- Develop the programs and brand strategy to successfully launch, promote and sustain CPA as the Canadian accounting and business credential
- Cultivate an environment of thought leadership and advocacy to build respect and recognition of the CPA profession globally

Key Objective 2: Unify the Accounting Profession

- Integrate CGA-Canada and ensure effective transition of people and resources
- Support provincial unification process
- Continue management and wind down of CICA and CMA Canada

Key Objective 3: Support Standard Setting

- Enhance and sustain quality of output
- High-quality Canadian appointments to standard-setting boards
- Develop strong external relations

Key Objective 4: Foster Organizational Effectiveness

Develop, engage and retain excellent people by creating a culture of continuous improvement, innovation and inclusiveness. Ensure CPA Canada optimizes the required resources, structures and processes to maintain a financially viable and sustainable organization

Key Objective 1: Enhance Member and Stakeholder Value – Top Priorities by Department

- Build recognition of the CPA profession by creating, supporting and enhancing the products, services and resources available to our members and stakeholders
- Develop the programs and brand strategy to successfully launch, promote and sustain CPA as the Canadian accounting and business credential
- Cultivate an environment of thought leadership and advocacy to build respect and recognition of the CPA profession globally

KEY PRIORITIES by Department	Services to Engage and Enhance Member and Stakeholder Value	Develop and Launch CPA Certification Programs	Enhance Thought Leadership and Advocacy
Education Certification		<ul style="list-style-type: none"> • PEP: Complete development and launch nationwide • PREP: Complete development • Mid-Tier: Develop and agree on launch • Develop/administer CPA exams 	
Communications	<ul style="list-style-type: none"> • Implement Member Engagement and Value Strategy to enhance CPA brand • CPA stakeholders communication strategy to increase awareness and recognition of CPA Brand Value proposition 	<ul style="list-style-type: none"> • Marketing and communications for CPA education programs • Build “Become a CPA” national website 	<ul style="list-style-type: none"> • Public and consumer interest. CPA Canada is leading body on fiscal, economic and professional issues
Professional Learning and Development	<ul style="list-style-type: none"> • Reassess overall approach to Professional Learning and Development • Develop and launch specialization programs • Continue development of new In-Depth Tax Course • New program offerings for consolidated membership 		
Member Services	<ul style="list-style-type: none"> • CPA Magazine • Deliver publications relevant to our membership and their clients • Deliver value-added resources and increase member awareness of resources • Review/expand data profile collected on members 		<ul style="list-style-type: none"> • Financial Literacy program
Research, Guidance & Support	<ul style="list-style-type: none"> • Members have access to relevant technical resources to help them advance and excel • Enhance communications for monitoring and assessing value of products 		<ul style="list-style-type: none"> • Position CPA Canada as a leader in supporting Canada’s capital markets • Emerging issues research • Research and advocacy on contemporary issues

Key Objective 1 (Continued)

KEY PRIORITIES by Department	Services to Engage and Enhance Member and Stakeholder Value	Develop and Launch CPA Certification Programs	Enhance Thought Leadership and Advocacy
Standards	<ul style="list-style-type: none"> • Leverage recommendations for audit quality process • Increased focus on broader stakeholder outreach 		
Tax	<ul style="list-style-type: none"> • Position CPA as leader in tax education • Position CPAs as leaders in provision of tax services • Best practices in tax/codes of conduct • Tax specialization 		<ul style="list-style-type: none"> • Promote extension of privilege for accountants • Thought leadership in tax evasion, avoidance, and competition
Finance and Administration	<ul style="list-style-type: none"> • Deliver a new website infrastructure including new CMS • Develop CPA Canada's first annual report • Provide high-quality interface with French-speaking members 	<ul style="list-style-type: none"> • Provide IT platforms required by Education certification programs • Implement extended hours student help desk 	
Executive	<ul style="list-style-type: none"> • Develop and implement international strategy • Support Audit Quality/Value of Audit Process • Commence relevance of financial reporting project • Oversee overall stakeholder engagement plan 		<ul style="list-style-type: none"> • Support tax thought leadership

Key Objective 2: Unify the Accounting Profession – Top Priorities by Department

- Integrate CGA-Canada and ensure effective transition of people and resources
- Support provincial unification process
- Continue management and wind down of CICA and CMA Canada

KEY PRIORITIES by Department	Integrate CGA-Canada and Ensure Effective Transition of People and Resources	Support Provincial Unification Process	Continue Management and Wind-down of CICA and CMA Canada
Education Certification	<ul style="list-style-type: none"> • Utilize CGA-Canada staff where possible 		<ul style="list-style-type: none"> • Effective wind-down of legacy programs
Communications	<ul style="list-style-type: none"> • Utilize CGA-Canada staff where possible 	<ul style="list-style-type: none"> • Continue unification momentum strategy • Facilitate national and provincial communications committee • Facilitate Government Relations sub-committee 	
Member Services	<ul style="list-style-type: none"> • Import and manage new members within unified membership data-base 	<ul style="list-style-type: none"> • Ensure access to accounting, auditing and assurance is available to full membership 	
Research, Guidance & Support	<ul style="list-style-type: none"> • Ensure composition and mandate of all volunteer groups include perspectives and appropriate representation of legacy memberships 	<ul style="list-style-type: none"> • A national strategy for the identification, development and delivery of member engagement, and technical research, guidance and support 	
Tax	<ul style="list-style-type: none"> • Active tax committees reflective of combined membership 		
Finance and Administration	<ul style="list-style-type: none"> • Integrate technology services • Manage human resource transition and integration of CGA-Canada staff 	<ul style="list-style-type: none"> • Support centralization of any services 	<ul style="list-style-type: none"> • Continued financial management of legacy wind-down
Executive	<ul style="list-style-type: none"> • Develop ongoing management structure and oversee integration of CGA-Canada operations • Make a decision re ongoing Vancouver presence • Resolve CGA-Canada insurance issue 	<ul style="list-style-type: none"> • Provide assistance to provincial bodies as required • Support Education with Ontario Public Accountants Council matters • Strategy for dues harmonization 	<ul style="list-style-type: none"> • Support legacy national boards

Key Objective 3: Support Standard-Setting – Top Priorities by Department

- Enhance and sustain quality of output
- High-quality Canadian appointments to standard-setting boards
- Develop strong external relations

KEY PRIORITIES by Department	Enhance and Sustain Quality of Output	High-Quality Canadian Appointments to Standard-Setting Boards	Develop Strong External Relations
Education Certification			<ul style="list-style-type: none"> • Strengthen relationships/partnerships with academic community • Support academic research
Communications			<ul style="list-style-type: none"> • Establish and communicate role of CPA Canada in relation to the Standards Boards
Professional Learning and Development	<ul style="list-style-type: none"> • Provide education-related support for standards implementation 		
Research, Guidance & Support	<ul style="list-style-type: none"> • Conduct research in financial accounting and assurance • Assist Standards group in engagement with stakeholders in development and implementation of new standards 		
Standards	<ul style="list-style-type: none"> • Improved collaboration within CPA Canada • Increased focus on process improvement and sharing best practices 	<ul style="list-style-type: none"> • High-quality appointments to Canadian and international standard-setting committees • Improve diversity of oversight councils 	<ul style="list-style-type: none"> • Improved collaboration with other stakeholders (e.g., regulators) • Focus on broader stakeholder outreach
Finance and Administration	<ul style="list-style-type: none"> • High-quality translation of all Canadian and international standards in a timely manner • Assist Standards group in effective distribution of information 		
Executive			<ul style="list-style-type: none"> • MOU with CPAB • Financial support for IASB and IFAC

Key Objective 4: Foster Organizational Effectiveness – Top Priorities by Department

- Develop, engage and retain excellent people by creating a culture of continuous improvement, innovation and inclusiveness. Ensure CPA Canada optimizes the required resources, structures and processes to maintain a financially viable and sustainable organization.

KEY PRIORITIES by Department	Create a Culture of Continuous Improvement, Innovation and Inclusiveness	Optimize Resources and Structure	Enhance Collaboration both within CPA Canada and with CPA Provincial Bodies
Education Certification		<ul style="list-style-type: none"> • Develop a cost-recovery model for CPA certification programming • Complete reorganization of Education structure 	<ul style="list-style-type: none"> • Establish CPA certification governance model
Communications	<ul style="list-style-type: none"> • Develop employee communication strategy for culture initiative 		<ul style="list-style-type: none"> • Facilitate national/provincial branding committee
Professional Learning and Development		<ul style="list-style-type: none"> • Meet fiscal 2015 sales and contribution targets 	<ul style="list-style-type: none"> • Governance model with provinces for Professional Learning and Development
Member Services		<ul style="list-style-type: none"> • Meet fiscal 2015 sales and contribution targets • Increase market share • Employ new methodologies for publishing • Develop new volunteer management strategy and program for all CPA Canada volunteers 	<ul style="list-style-type: none"> • Collaborate across organization and provincially • Work interdepartmentally to meet business needs • Support research needs of all departments
Research, Guidance & Support	<ul style="list-style-type: none"> • Work with other CPA Canada groups to create formal processes for communication, co-planning and product development 	<ul style="list-style-type: none"> • Explore opportunities to collaborate in process and output of other CPA Canada groups 	
Standards	<ul style="list-style-type: none"> • Support efforts in culture, evaluations and management development 	<ul style="list-style-type: none"> • Greater focus by staff and volunteers on process improvement 	<ul style="list-style-type: none"> • Improve collaboration across CPA Canada

Key Objective 4 (Continued)

KEY PRIORITIES by Department	Create a Culture of Continuous Improvement, Innovation and Inclusiveness	Optimize Resources and Structure	Enhance Collaboration Both within CPA Canada and with CPA Provincial Bodies
Finance and Administration	<ul style="list-style-type: none"> • Lead change management and culture initiative 	<ul style="list-style-type: none"> • Instill business partner focus in all administrative departments • Review/replace reprographic and AV equipment • Create long-term technology strategy • Implement ITIL processes/training to increase stability of systems • Implement workflow software system • Improve backup systems in technology infrastructure (risk mitigation) • Meet 2014/15 financial targets • Implement new improved information systems 	<ul style="list-style-type: none"> • Explore ways to establish key areas (finance, HR, translation, IT) as trusted advisors and key partners for all business units • Increase collaborative technologies for information distribution • Maintain and promote national platforms when possible
Executive	<ul style="list-style-type: none"> • Champion culture change 		<ul style="list-style-type: none"> • Manage Council of Chairs, Chief Executive, and national/provincial oversight committees