

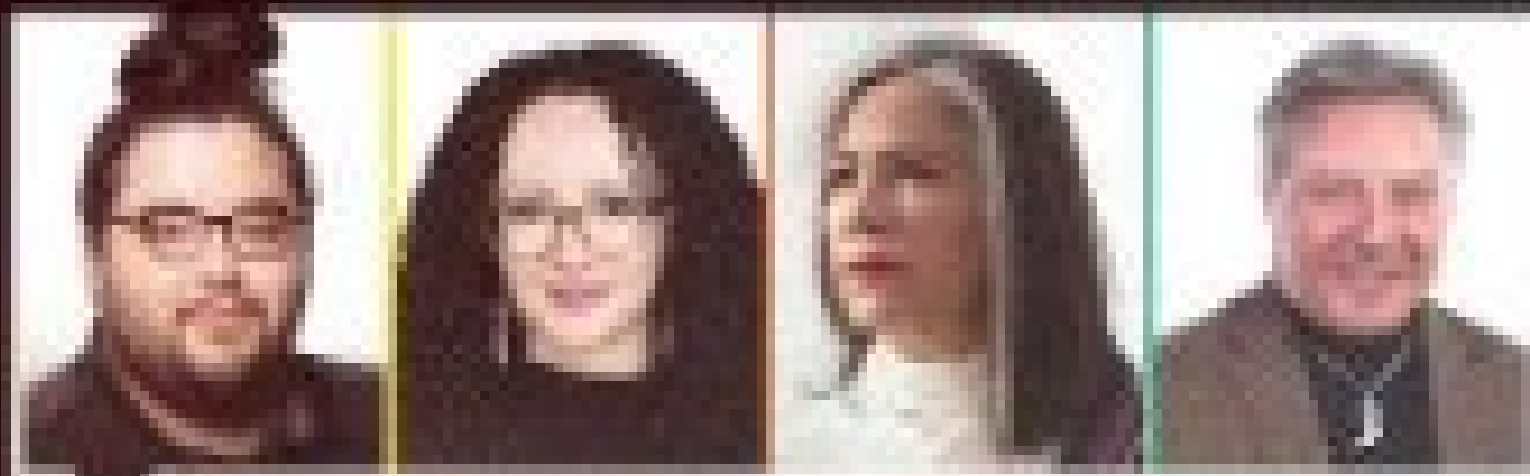
AFOA Atlantic

Conference

November 23 and 24, 2022
Halifax, Nova Scotia

Terry Goodtrack, MPA, B Admin, FCPA, FCGA, CAFM, CAPA, C.Dir
President & Chief Executive Officer

THERE'S **NO LIMIT** TO WHAT YOU CAN **ACHIEVE**.
AND WE'RE **HELPER** TO HELP.



NO IT'S A BUSINESS LIMIT & WE CAN HELP YOU **ACCOMPLISH**
IT. **WE'RE YOUR PARTNER** & WE CAN HELP
YOU **ACHIEVE** YOUR GOALS & YOUR DREAMS.

Presentation Outline

Membership

Member Engagement

Professional Development – Certified Programs

New Initiatives

Scholarships (Tuition Assistance)

National Conference

AFOA Canada Strategic Plan

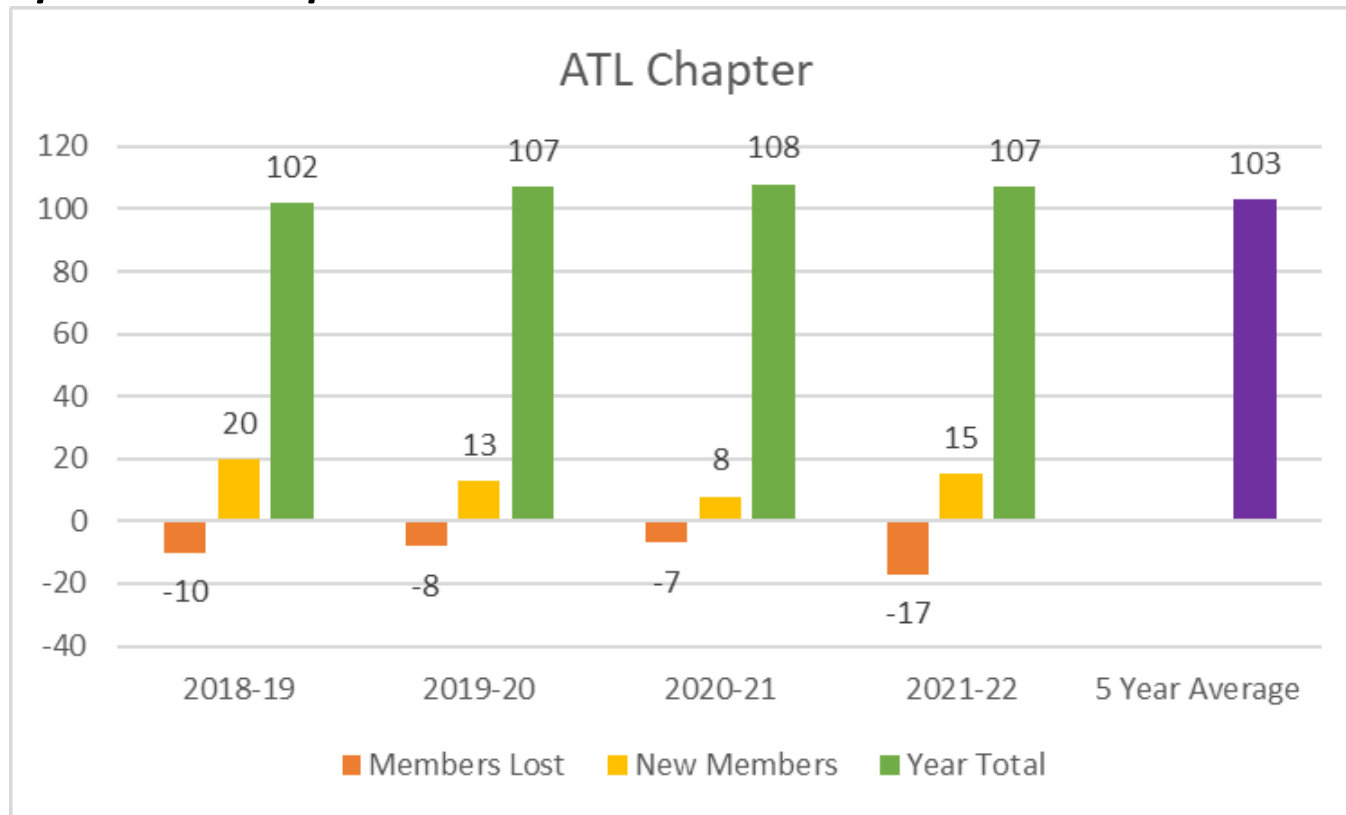
Future of Financial Management

Questions & Comments

107 Active Members
March 21, 2022

Atlantic Chapter











Graphical Representation

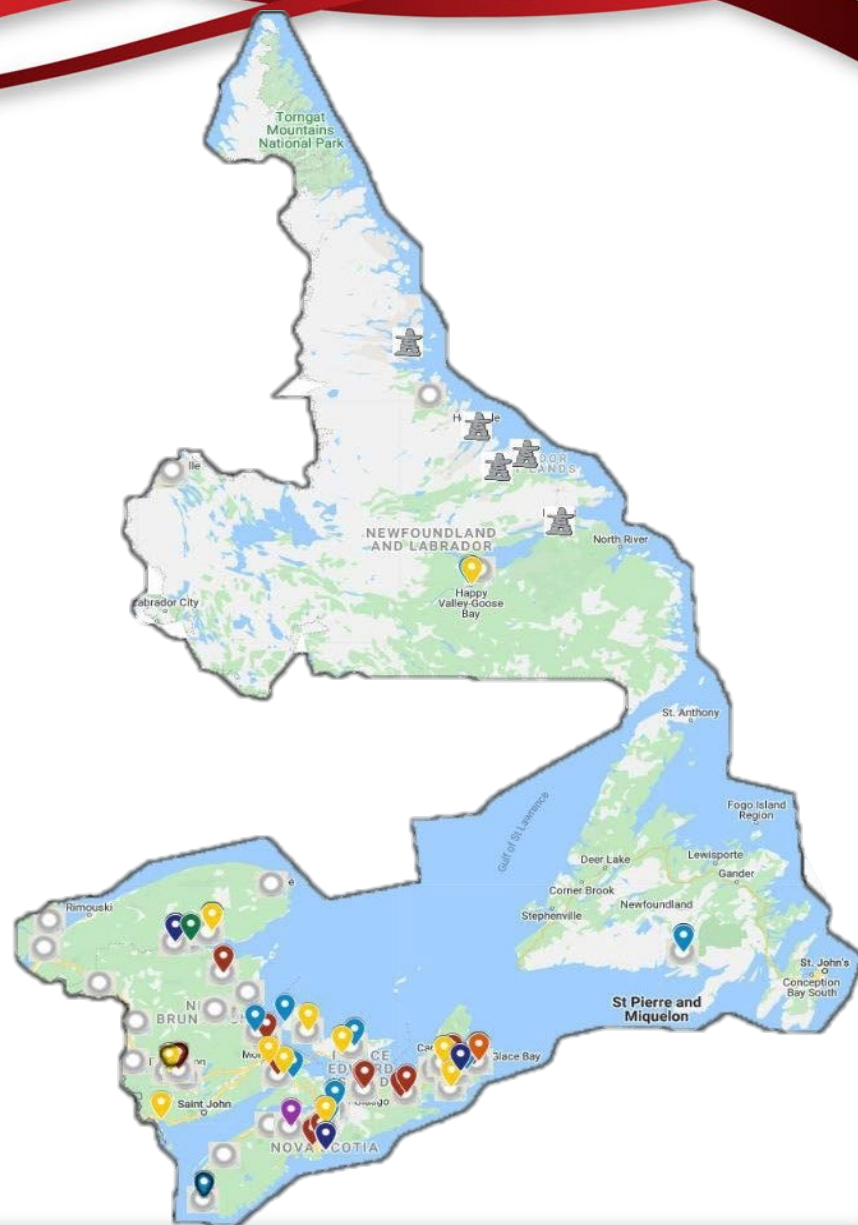


ATL Chapter (107)

Membership Mapping at March 31, 2022

FIRST NATIONS & MEMBERS MAP

ASSOC		58
CAFM		23
CAPA		20
CIL		1
CIHRP		1
CERT+		3
RET,STU,ELD		1
First Nations		
Metis Settlements		
Inuit Communities		



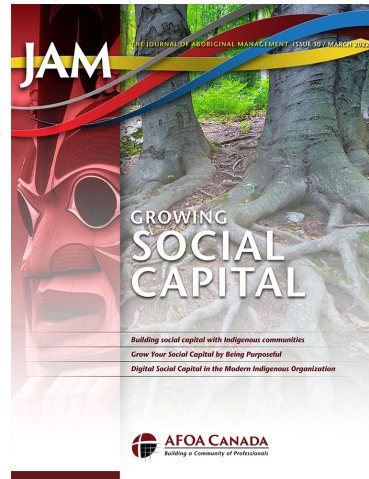
Member Engagement

Board of Directors

Scholarship and Bursary Committee



Facilitators



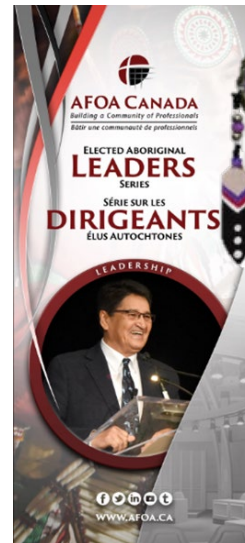
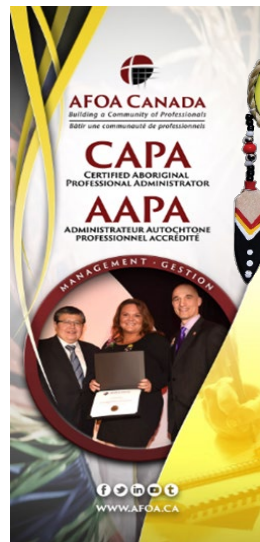
 **AFOA CANADA**
Building a Community of Professionals

AFOA CANADA NATIONAL VIRTUAL TAX CLINIC

Free tax filing services for Indigenous people

(866) 722-2362 | taxclinic@afao.ca
www.afao.ca

Professional Development – Certified Programs





Leading People and Investing to Build Sustainable Communities

May 9 - 13, 2022

Harvard Business School



Harvard
Business
School

Executive
Education



653



226



27



50



182

Over 1,000 Certifications & Designations!!

NATIONAL VIRTUAL CAPACITY DEVELOPMENT WORKSHOP SERIES

AFOA Canada is pleased to announce that we are launching a series of National Virtual Capacity Development Workshops! Learn from the comfort of your own home and office on key management and financial issues that are part presentation, part team work, part workshop and mostly hands-on learning to help you conquer your challenge, raise the bar in your workplace or face a new community issue head on. All you need is a computer with internet connection.



Workshop

The Role of the Board's Treasurer, and the Finance and Audit Committee
 First Nations Governance IV - Strategy
 Human Resources Management Essentials: Module 4 - Compensation and Workforce Analytics
 First Nations Governance I - Governance Concepts
 First Nations Governance II - Community and External Relations
 First Nations Governance III - Nation Building
 Human Resources Management Essentials: Module 5 - Workplace Wellness

Date(s)

May 4, 2022
 May 18 - 19, 2022
 June 16, 2022
 September 22, 2022
 October 20, 2022
 November 24, 2022
 December 1, 2022

Why Choose Virtual Live Training?

Save money

Eliminate travel time and expenses – AFOA Canada requires no travel to a venue location, making it very cost effective.

Facilitator-led methodology

An instructional setting that is two-way, person-to-person and in real time, offers incomparable learning potential. As in traditional face-to-face training workshops, AFOA Canada offers these same valuable benefits from the comfort of your own workspace.

Varied learning environment

AFOA Canada offers a varied learning experience. In addition to hands-on learning, the environment includes visual, video and audio interaction, social media, polling, chatting and more. The effective integration of these components bridges the potential for training to educate, engage and inform.

SPACES ARE LIMITED! VISIT AFOA.CA TO REGISTER TODAY.

For more information, please contact the Training and Events Team at Workshops@afocanada.ca or toll-free at 1-866-722-2362.



New Initiatives



IT Workshops



Audience:

- New and Experienced Bookkeepers
- Finance/Accounting Supervisors

Delivery Format

- Series of 5 Courses that are 1 day each on basic accounting and bookkeeping skills and knowledge
- Delivered Virtually or as a Regional Seminar Week
- Potential to Host at Colleges as Mini-Certificate Program

Proposed Accounting Basics Seminars

Accounting Basics I	<ul style="list-style-type: none"> - How accounting information is used - Accounting principles and the accounting cycle - Understanding Financial Statement – basics - Segregation of Duties and Financial Control - Budgeting and Budget Variance Analysis
Accounting Basics II	<ul style="list-style-type: none"> - Sub-ledgers - GL and Journal Entries - Bank Reconciliations - Accounts Payable - Recording Transfer Payments and Revenue Recognition
Payroll Administration	<ul style="list-style-type: none"> - Payroll Administration Rules - Payroll administration and payroll providers - How to create, maintain and report individual payroll records
Financial System and Chart of Accounts	<ul style="list-style-type: none"> - What is a Chart of Accounts and how to use it - Tips for setting up your Chart of Accounts - How to enter, adjust and report typical daily and year-end business transactions
Funding Agreement Accounting	<ul style="list-style-type: none"> - Understanding funding agreement requirements - Fund accounting - maintaining records of expenses - Monitoring budgets for funding agreements - Recording revenue for funding agreements - Reporting on funding agreements

Leadership Excellence Webinar Series

(1-hour webinars)

Webinars 2021-22:

1. Roles and Responsibilities of Council and Executive Management
2. Conducting Effective Council Meetings
3. Ensuring Proper Financial Control and Oversight
4. Strategic and Operational Planning
5. Hiring Executive Directors and CFOs for Indigenous Governments
6. Getting the Most from Internal Financial Reporting
7. Understanding and Interpreting Financial Statements
8. Conflicts of Interest are a Routine Occurrence: Learn how to manage them effectively

<https://afoa.ca/education/workshops/financial-resiliency/>

Scholarships (Tuition Assistance)

Scholarships & Bursaries

The Indigenous Learning Centre is dedicated to helping Indigenous people reach the highest standard of excellence in finance, management and leadership. ILC's initiatives in the development of Awards and Scholarships are examples of that commitment. Each year the following bursary and scholarships are presented:

Professional Development Scholarships



Amount Varies

The Professional Development Scholarships are available to anyone who wishes to take AFOA Canada courses. This scholarship is intended to offset the full registration costs for AFOA Canada courses and help qualified candidates who do not have the financial resources required to pursue one of AFOA Canada's designations or attend professional development courses.

[Learn More](#)



AFOA CANADA

Building a Community of Professionals



2023
MNP-
AFOA CANADA
INDIGENOUS
COMMUNITY
EXCELLENCE

Award

FOR SUSTAINABLE COMMUNITIES

ABOUT THIS AWARD

The MNP-AFOA Canada Indigenous Community Excellence Award recognizes an Indigenous community that has demonstrated significant change through governance, leadership, and management excellence. A task not easily accomplished, but has been undertaken by an entire community to propel change for its members.

Applicants/Nominees are asked to demonstrate how their commitment towards progression has positively impacted their members, stakeholders, and those they work with.

AWARD CRITERIA

Please share information on your Community's journey of generating change towards *Building a Sustainable Community*. (40 points)

- a Location, history, culture, challenges, opportunities
- b What inspired change in your community?
- c What is the vision for the community's social and economic future?
- d What resources and relationships will be required over the next 5-10 years?

OTHER DETAILS TO CONSIDER

Please feel free to include details on: (10 points / maximum 1 page)

- a Change in employment rates, education rates, housing stats, the inclusion of youth, elders, financial information, recommendation letters from stakeholders, etc.

DEADLINE TO APPLY OR NOMINATE IS NOVEMBER 18, 2022

The MNP-AFOA Canada Indigenous Community Excellence Award will be presented at a special gala during the AFOA Canada National Conference in Ottawa, Ontario on February 16, 2023. Two community representatives will also receive complimentary conference registration and financial assistance to attend the conference. Visit afoa.ca to apply!

FOR MORE INFORMATION CALL 1-866-722-2362 OR VISIT www.afoa.ca



AFOA CANADA
Building a Community of Professionals

MANAGEMENT · FINANCE · GOVERNANCE



**2023 AFOA CANADA
INDIGENOUS LEADERSHIP
AWARD**

*Recognizing Leadership
and Achievement in
Indigenous Management
and Finance*

Deadline

November 18, 2022

Do you know an Indigenous Professional who has made a significant contribution to your community or organization?

Do you want to recognize and acknowledge the level of commitment that this outstanding individual has shown? Nominate them for the AFOA Canada Indigenous Leadership Award sponsored by TD Bank.

AWARD CRITERIA

The recipients has:

- Continuously demonstrated a sincere and long-term commitment to excellence in Indigenous management, finance, or governance in Canada
- Senior finance, management or governance responsibilities in an Indigenous community or organization
- Demonstrated leadership skills that have motivated and inspired others
- Made a significant contribution and inspired others on an ongoing basis to the field of management, finance, or governance
- Made a measurable impact on the management and/or the financial performance and/or the governance of Indigenous community(ies)/ organization(s), and
- Raised the standards of Indigenous management, finance, and governance practices.

The Award will be presented at a special ceremony during President's Reception at the AFOA Canada National Conference in Ottawa, Ontario, February 14-16, 2023. The recipient will receive complimentary registration and financial assistance with travel to the conference.

For more information, please contact AFOA Canada:

Toll Free: 1-866-722-2362 | Fax: 613-722-3467
communications@afoa.ca | afoa.ca

#AFOA2023





Nutrien
Feeding the Future™

f t i n
#AFOA2023

AFOA CANADA
Building a Community of Professionals



Nutrien Indigenous Youth Financial Management Awards



Four outstanding Indigenous Youth from across Canada will receive a scholarship of up to \$5,000 and be invited to attend the next AFOA Canada National Conference in February 2023.

WOULD YOU LIKE TO:

- Jump start your career?
- Meet Canada's most prominent Indigenous leaders who are making a positive change?
- Meet other inspiring Indigenous youth?

ELIGIBILITY:

Open to Indigenous students in Grades 11 or 12* who are pursuing post-secondary education in the areas of finance, management, commerce or related fields (e.g., business administration, accounting.)

AWARD RECIPIENTS WILL ENJOY:

- A five-year scholarship package valued at up to \$5,000
- Complimentary travel to the next AFOA Canada National Conference
- An AFOA Canada gift package (value of \$200)

*Secondary IV and V in Quebec
**Maximum age of 19 as of February 1, 2023

"I am so thankful to AFOA Canada and Nutrien for giving myself and my fellow award winners - such an amazing experience. Your selfless efforts have given each of us a massive head start in achieving our educational and career goals. My time at the AFOA Canada National Conference was unforgettable and taught me so much. I hope you continue to make a positive difference in the lives of young Indigenous people."
- DAVID BUZZA, MISSION, BC

APPLY ONLINE NOW!

DEADLINE IS NOVEMBER 18, 2022 AT 9PM EST
1-866-722-2362 | youthawards@afoa.ca | www.afoa.ca

THE INDIGENOUS ECONOMY OF TOMORROW

Through economic development, many communities grow their local revenues that in turn provide funding for much needed program and services to their community members. The disruption of COVID-19 had a dramatic effect on Indigenous communities, businesses and organizations. Senior staff are rethinking their strategies to revitalize Indigenous businesses so that Indigenous communities continue to grow their revenues and local economies. This is a must attend conference, if you are part of the consultation, advisory or decision-making processes on whether to pursue a particular business opportunity.

WHO SHOULD ATTEND

Delegates to the conference include professionals, practitioners, executives and stakeholders working with First Nations, Métis and Inuit communities and organizations.

FEATURING

- Excellent networking receptions that will connect you with over 1,000 Indigenous Professionals, peers and colleagues from across Canada
- Over 50 expert speakers focusing on leading edge trends, sharing of best practices and relevant issues impacting our profession and our communities
- Interactive tradeshow that showcases over 70 exhibitors who offer choices and solutions in one location
- Informative, exciting and relevant Education Information Sessions
- World class Keynote and guest speakers during all plenaries and luncheons
- Closing Banquet and AFOA Canada CAFM/CAPA/CIL/CIHRP Convocation including Award presentations and entertainment
- Enjoy Ottawa and what this beautiful city has to offer

PROGRAM

Concurrent sessions will focus on five relevant themes:

- Leadership and Governance** - Featuring success stories and trends in governance
- Management, Finance and IT** - Best practices in management, finance and information technology
- Business Development** - Featuring success stories and trends in community business development and Entrepreneurship
- Wealth Creation** - Featuring trends and best practices in creating community wealth
- Human Capital** - Creating healthy work environments that reflect Indigenous culture

AFOA CANADA 2023 PRE-CONFERENCE WORKSHOPS

2-DAY WORKSHOPS February 13 & 14, 2023	1-DAY WORKSHOPS February 13, 2023	1-DAY WORKSHOPS February 14, 2023
<ul style="list-style-type: none"> • Wills & Estates: The Role of the Executor • First Nations Governance IV - Strategy • An Introduction to Comprehensive Community Planning for First Nations • Project Management for Large Infrastructure Projects 	<ul style="list-style-type: none"> • Human Resources Management Essentials: Module 1 - Strategy and Leadership • NEW IT Capacity Management and User Support 	<ul style="list-style-type: none"> • Human Resources Management Essentials: Module 2 - The Employment Relationship and Employee Experience • NEW Security/Information Protection

THE PREMIERE CONFERENCE FOR INDIGENOUS MANAGEMENT, FINANCE AND GOVERNANCE PROFESSIONALS THAT FOCUSES ON BUILDING CAPACITY AND CREATING WEALTH IN OUR COMMUNITIES.

For more information visit www.foa.ca or contact AFOA Canada at conference@foa.ca or 1-866-722-2362 for Registration, Exhibitor and Sponsorship Opportunities.



Vision

AFOA Canada is the centre of excellence in Indigenous management, finance and governance

Mission

Building a community of professionals by respecting and supporting individuals, organizations and communities on their journey to management proficiency, professional certification and self-reliance.



Strategic
Objectives

Increasing membership
value and participation

Supporting communities
in achieving their
aspirations

Strengthening
organizational
sustainability



Objectives

Future of Financial Management (CPA Canada Foresight – The way forward)

- Tendency to focus on historical financial information
- Value is increasingly intangible - S&Ps Market Value
 - (Tangible Assets today: 16%)
 - (Tangible Assets 40 years ago: 83%)
- Rise in technological tools
- Focus on a circular economy opposed to a linear economy
- Focus on sustainability - ESG and Sustainability Development Goals (SDG)
- Need for trusted professionals in an era where trust in leaders and information is decreasing

Future of Financial Management (CPA Canada Foresight – The way forward)

Permanently
proactive
role

Measure value beyond financials to capture societal expectations

Harnessing the power of vast quantities of data to make decisions and establishing new models for data governance and decision making

Developing new skills and competencies

Protecting integrity, trust and ethics

Thought Partner

Trusted Advisor



Data Analytics



Human Capital – Attraction & Retention





Questions & Answers

