

Certified Professional Bookkeepers of Canada

Strategic Plan

2021 - 2024

Background

With a membership base of approximately 1730 members across Canada, CPB Canada is at a pivotal point in our evolution as a professional association. This strategic plan follows an ambitious three-year period whereby the organization underwent a significant transformation.

These changes include, but are not limited to, a name change and complete re-brand, implementation of a new member management system, and re-conceiving the membership and certification programs. In the end, CPB Canada has progressed positively during the pandemic and is now re-positioned to capture new opportunities and successes into the future.

As we continue to create a diverse professional community that inspires excellence and builds meaningful connections, the time is now to embark on a new strategic plan that will serve as a guiding light, clearly illuminating the path toward our intentional goals and outcomes.





Who We Are

The Certified Professional Bookkeepers of Canada (CPB Canada), legally known as the Institute of Professional Bookkeepers of Canada (IPBC), is a member-based association, a national certifying body, and the leading professional and career development organization for bookkeepers in Canada. As a professional association created for bookkeepers, we are Canada's most prominent and fastest-growing bookkeeping association.

What We Do

Our mission is to create a diverse professional community that inspires excellence, builds meaningful connections, and fosters innovation and learning.

From continuing professional development and business resources to meaningful networking, mentoring, and peer support - our members have access to the resources needed to advance their careers and achieve a sense of professional belonging in the bookkeeping community.

Through webinars, regional meetings, and an annual conference, we bring together and support bookkeeping professionals at all levels of their careers. We help our members stay on top of industry updates and trends by partnering with national experts in accounting technology, bookkeeping principles, business operations, and government regulations.

CPB Canada maintains the national bookkeeping standard in the accounting profession through the Certified Professional Bookkeeper (CPB) designation. These standards guide the knowledge, business practices, and ethical standards required for professional bookkeepers to be certified in the accounting industry.

Whether you're an experienced professional, a student, or just starting your career – CPB Canada has the programs and services needed to succeed as a bookkeeping professional in Canada.

Strategic Plan Development

The process of strategic planning begins with discovery and engagement and ends with formal implementation and ownership. These approaches were utilized in the development of the CPB Canada Strategic Plan, including:

1. Planning and Stakeholder Identification
2. Research & Analysis
3. Strategic Planning Sessions
4. Wrap up & Implementation

Notable activities related to discovery and engagement included:

A Fellows Town Hall Meeting

Representing the highest honour, the Fellow Award recognizes individuals who have given exemplary and outstanding service to CPB Canada. A separate meeting was held with the Fellows to gain their unique perspective about the history and future of CPB Canada. The insight gained through the discussions with these exceptional members was deep and well-rooted in the organization's history and hopes for the future.

A Membership Survey

A short survey was sent to the membership. The questions were designed to learn what the membership wanted from CPB Canada. It sought to know when members felt engaged, how they felt CPB Canada was performing, and what was needed over the next three years. These results would be incorporated as context into the strategic analysis sessions.



Strategic Plan Development - continued

Strategic Analysis Sessions

The strategic analysis occurred over three - 3-hour sessions conducted via ZOOM and utilizing a virtual tool that allowed flip charts and dotmocracy to be used interactively.

Over the course of the three sessions, the team was briefed on the analysis of the members and board/staff survey responses to help inform the process along with four other distinct and interactive steps to reach the final strategic goals and objectives Strategic Plan.

The final CPB Canada strategic plan and its priorities will function in three specific ways:

- A roadmap giving direction to the organization to help it continue to be a sustainable mission-driven professional association that creates a better future for its community and members.
- The Board of Directors is able to provide a structure of accountability for senior management.
- A framework for general reporting to the Board of Directors with indicators, timelines and outputs/outcomes.

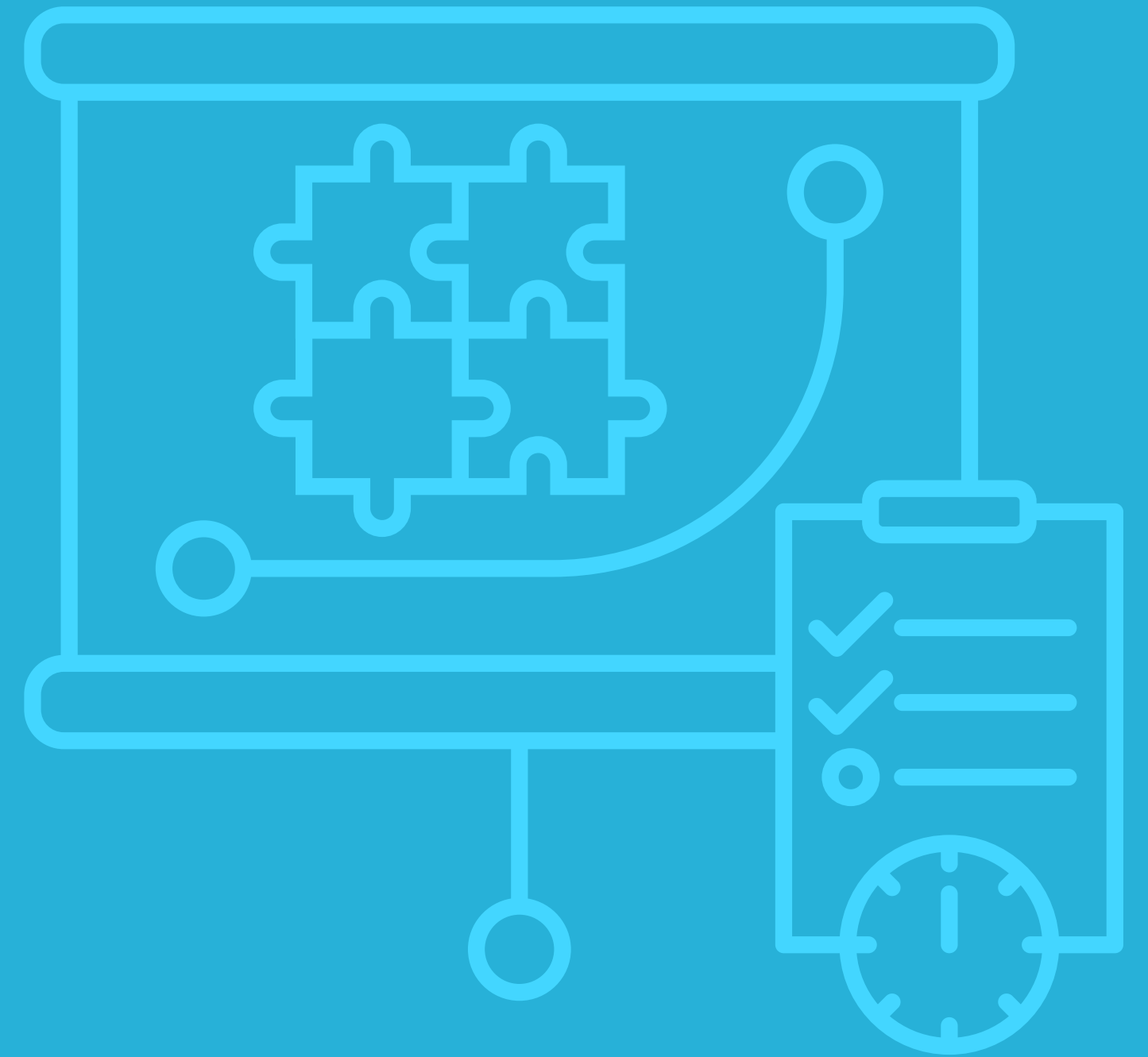


Strategic Goals & Objectives, 2021 - 2024

Strategic goals and objectives are guideposts on our path to achieving our mission and vision. Through a three-session visioning process, the following five (5) strategic priorities were identified.

Strategic plan goals and objectives over the next three years include:

1. Membership
2. Programming & benefits
3. Fiscal sustainability
4. Awareness
5. Organizational strength



Strategic priority

Our approach

To achieve this we will:

Membership

Grow a broad and diverse membership base

- Broaden the membership base
- Increase member engagement
- Build an educational institutional pathway to CPB Canada

Programming & benefits

Pioneer and offer relevant and enriching programming in industry knowledge and best practices

- Expand the range of professional development offerings
- Grow strategic alliances

Fiscal sustainability

Remain financially stable to support our members into the future

- Expand revenue streams
- Build healthy reserve funds, investments, and financial policies

Awareness

Cultivate a national presence to increase the value and professionalism of CPB Canada – as the go-to organization

- Build awareness with relevant business communities/associations
- Gain recognition as the national certifying body
- Become proactive with a communications and marketing strategy
- Establish a public affairs presence
- Explore the merits of regulation and potential feasibility

Organizational strength

Develop human resource and operating systems that foster internal capacity and drive value

- Align staffing capacity as appropriate for strategic goals
- Engage in consistent board professional development
- Improve workflows and systems to support a healthy workplace and future growth
- Develop a risk management strategy to inform decision-making
- Explore board and staff diversity and representation
- Explore the potential for increased bilingualism

Acknowledgements

Strategic planning steering committee:

- Colleen Hoggarth, CPB, FCPB – 2020-21 Board Chair
- Marnie Stretch, CPB – 2020-21 Vice-Chair
- Rick Johal, CAE – Chief Executive Officer
- Jeff Caverly, CPB – Manager, Finance and Administration

CPB Canada Fellows town hall:

- Laura Sellers, CPB, FCPB
- Rod Cox, CPB, FCPB
- Colleen Hoggarth, CPB, FCPB
- Gordon Holley, CPB, FCPB
- Shelley Rudiger, CPB, FCPB
- Dianne Mueller, CPB, FCPB
- Louie Prospero, CPB, FCPB
- Marian Rice, CPB, FCPB
- Marge Wegren-Debre, CPB, FCPB
- Marnie Stretch, CPB
- Rick Johal, CAE
- Jeff Caverly, CPB

Strategic planning session participants:

Board of Directors

- Colleen Hoggarth, CPB, FCPB
- Bernie Pirot, CPB
- Jennifer Bauldic, CPB
- Lin James, CPB
- Lynne Moore, CPB
- Teresa Slack, CPB
- Tanya Hilts, CPB
- Marnie Stretch, CPB
- Christie Craven, CPB
- Connie Sparks, CPB
- Rod Cox, CPB, FCPB
- Kellie Parks, CPB

Invited Guests

- Kerri Bouffard, CPB
- Tracy Lampron, CPB, FCPB
- Beverly Haggins, CPB, FCPB

Management & staff:

- Rick Johal, CAE, Chief Executive Officer
- Cindy Smith, Manager, Membership & Partnerships
- Jeff Caverly, CPB, Manager, Finance & Administration
- Rianne Kempt, Administrative & Marketing Coordinator
- Meagan Rockett, Member Programs & Services Officer

