

CPA Saskatchewan

Standard Criteria and Documentation for Fellow
Chartered Professional Accountant (FCPA)

January 2016



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1.0 OVERVIEW

The Chartered Professional Accountants of Saskatchewan (CPA SK) formally recognizes those members who have rendered exceptional services to the profession or whose achievements in their careers or in the community have earned them distinction and brought honour to the profession by the awarding of the title and designation Fellow Chartered Professional Accountant (FCPA).

The purpose of this guide is to assist individuals wishing to nominate a member of CPA SK for an FCPA. It outlines in detail each phase of the process and will serve as an essential reference. Following the steps as outlined in this guide will assist with a complete and successful nomination.

The nominators are responsible for ensuring that the submitted package is complete and that the information it contains is accurate. The package should be detailed enough to allow the CPA SK Board to fairly evaluate the nomination submitted. The decision of the CPA SK Board will be impacted by the care taken to describe the nominee's achievements. You should therefore clearly indicate the businesses, organizations and committees in which the member has been involved, his or her publications and accomplishments, as well as the relevant dates.

2.0 CRITERIA

2.1. Candidate Eligibility

The Fellow Chartered Professional Accountant (FCPA) will be granted to those members in good standing who have rendered exceptional service to the profession or whose achievements in their careers or in the community have earned them distinction and brought honour to the profession. The individuals who are eligible for nomination must meet the following criteria:

- The CPA must be a member in good standing of CPA SK
- There is no minimum required of years of membership before being eligible for nomination
- The individual will have demonstrated exceptional leadership, performance and made remarkable contributions in at least one of the following areas:
 - Professional career
 - Volunteer involvement to the accounting profession
 - Volunteer contribution to a professional, community or charitable organization
- FCPAs may be granted posthumously to a member who was in good standing during his/her lifetime
- Members who reside outside the province of Saskatchewan may be considered for an FCPA for the following reasons:
 - Contributions relevant to the Saskatchewan CPA profession or community, and/or
 - Exceptional service to the Canadian or international CPA profession

2.2. Nature of Achievements

A successful nomination must highlight the candidate's leadership and the exceptional nature of the candidate's performance in one of the following fields: professional career, volunteer involvement to the accounting profession or volunteer contribution to a professional, community or charitable organization. Candidates need not have made exceptional contribution or demonstrated leadership in each of these areas. Nominators must demonstrate that the remarkable contribution of the candidate is common knowledge and that the acknowledged achievements make the member a recognized and prominent leader due to the quality of his or her significant contribution in at least one of the selected fields of activity.

In addition, nomination packages must highlight the fact that the candidates clearly identify themselves and are known and recognized as a CPAs. The service and accomplishments of the individual throughout his/her career – not simply his/her career as a CPA – will be taken into account in determining eligibility.

2.3. Submission of the Nomination Package

Nominators are responsible for ensuring that the file is complete and that the information it contains is accurate and sufficient to allow the Committee to evaluate fairly the nominations submitted. The decision of the HR & Nominating Committee and the CPA SK Board will be impacted by the care taken to describe the member's achievements. You should therefore clearly indicate the business, organizations and committees in which the member has been involved, his/her publications and accomplishments, as well as the relevant dates.

While the nomination package must be complete in itself, the HR & Nominating Committee reserves the right to have the main facts in support of a nomination validated by an outside source.

2.4. Nomination Review and Decisions

A Chartered Professional Accountant who is in good standing, who, in the opinion of the CPA SK Board, has rendered meritorious service to the profession or whose career achievements or achievements in the community have brought honour to the profession by a resolution of two-thirds vote of the Board be designated on the register as a fellow of the Institute.

A Fellow Chartered Professional Accountant is entitled to receive a certificate in such form as the Board determines and is entitled to hold the certificate so long as such Fellow remains a Chartered Professional Accountant.

When a Fellow Chartered Professional Accountant has been suspended or expelled as per *The Accounting Profession Act 2014*, s.40, or has ceased to be a member as per the *CPA SK Regulatory Bylaws 2015*, (s20.3), the CPA SK Board will review the decision or agreement and determine by a resolution of a two-thirds vote, whether to revoke the designation of Fellow of the Chartered Professional. If the designation is revoked, the individual will be so advised with the reasons. Where any designation of Fellow is revoked, the individual must return to CPA SK any certificate of Fellowship.

3.0 CPA SK FELLOWSHIP NOMINATION PACKAGE

Nominators are responsible for ensuring that the package being submitted is complete and that all information it contains is accurate and sufficient to allow the CPA SK Board to evaluate fairly the nomination submitted. A person nominating a candidate must be a member of CPA SK. The name of this person is communicated to the CPA SK Board and he/she is required to provide a letter explaining why the candidate has been nominated. Should the members of the CPA SK Board wish to validate information contained in the file, the nominator may be contacted.

Please complete in full the nomination package by following the specific instructions for each section and filling in the information directly on the document. Please submit the completed package to rparry@cpask.ca by the published deadline.

FCPA Saskatchewan Nomination Form

We, the undersigned, members of CPA SK, nominate _____ of the city/town of _____ to be granted the title Fellow Chartered Professional Accountant. We have prepared and attached a nomination package based on the information known to us, and to the best of our knowledge is complete and accurate.

Name of Nominator (please print)

Name of seconder (please print)

Title or Position

Title or Position

Phone

Phone

Address

Address

City, Province, Postal Code

City, Province, Postal Code

Email

Email

Date

Date

Nominator's signature

Secunder's Signature

SECTION 1 – Identify the Proposed Candidate

Please identify properly the proposed candidate.

| | | |
|---------------------------|----------------------------|------------------------|
| _____ Surname | _____ Given names | _____ Date of Birth |
| _____ Current Employer | _____ Title or Position | |
| _____ Address | _____ City/Province | _____ Postal Code |
| _____ Phone | _____ Email | |

Year(s) accounting designation(s) was/were obtained and from what jurisdiction(s):

SECTION 2 – Remarkable or Outstanding Contribution

Remarkable Contribution

Nominators must demonstrate that the candidate’s acknowledged achievements make him or her a recognized leader due to the quality of his or her significant contribution to more than one of the three fields of activity listed.

If you select this option, complete at least two sections from among sections 3, 4 and 5.

Outstanding Contribution

In exceptional circumstances, candidates will be considered for fellowship for making an outstanding contribution to just one of the fields of activity. Nominators must demonstrate that the candidate’s acknowledged achievements make him or her a recognized and prominent leader in the field(s) of activity selected.

If you select this option, complete only one of sections 3, 4 or 5, but do so in sufficient detail to demonstrate clearly that the candidate has made an outstanding contribution.

SECTION 3 – Professional Career

Provide a listing of the candidate’s professional experience beginning with the current or most recent position held.

| # | Employer | Position | Years: From __to |
|----|----------|----------|------------------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

For each item listed above, please highlight the candidate’s leadership and describe the major achievements showing that the candidate has made an outstanding or remarkable contribution, and highlight the way these achievements earned the candidate distinction.

| Major Achievements: (please match the numbers to those above) |
|---|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

SECTION 4 - Volunteer Involvement in the Accounting Profession

List the main committees, task forces etc. within the accounting profession of which the candidate has been a volunteer member, the events or activities in which the candidate took part, and in what capacity (member, chair, organizer, speaker etc.).

| | Committees/Task Forces/Activities/Events | Position | Years: from __ to |
|----|--|----------|-------------------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

For each item listed above, describe the major achievements showing that the candidate has made an exceptional or remarkable contribution and highlight the way these achievements earned the candidate distinction.

| Major Achievements: (please match the numbers to those above) | |
|---|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

SECTION 5 - Volunteer Involvement within the Community

List the candidate's most important volunteer activities with civic, community, socioeconomic, professional or charitable organizations beginning with the most recent.

| | Organization | Position | Years: from __ to |
|----|--------------|----------|-------------------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

For each item listed above, describe the major achievements showing that the candidate has made an exceptional or remarkable contribution and highlight the way these achievements earned the candidate distinction.

| Major Achievements: (please match the numbers to those above) | |
|---|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

SECTION 6 – Awards, Titles or Honorary Distinctions

List all awards, titles or honorary distinctions the candidates holds beginning with the most recent.

| | | | |
|----|-----------|---------------|-------|
| 1. | Award: | Organization: | Year: |
| | Comments: | | |
| 2. | Award: | Organization: | Year: |
| | Comments: | | |
| 3. | Award: | Organization: | Year: |
| | Comments: | | |
| 4. | Award: | Organization: | Year: |
| | Comments: | | |
| 5. | Award: | Organization: | Year: |
| | Comments: | | |

SECTION 7 – Supporting Documents

This section should include letters of support attesting to the candidate's achievements. Please enclose the quality endorsement letters with the nomination package. The number of letters is unimportant. The letters of support should adequately highlight the candidate's leadership and the exceptional nature of the candidate's performance. Letters are not required for each aspect of the candidate's career presented; rather they should present evidence of specific aspects of the candidate's leadership ability and/or the exceptional nature of his/her performance.

Ideally, the letters would include the following:

1. A brief description of the organization, its work and role in the community.
2. The details of the nominee's involvement with the organization, including:
 - The role of the nominee
 - Significant accomplishments
 - The actions or duties the nominee took to achieve the accomplishment
 - The time commitment, if applicable
 - The impact of the nominee's work on the organization

Additional support materials:

Any emails, media clippings or publications can also be submitted. These items can reflect the same details as above or complement the factual information provided.

SECTION 8 - Checklist

CHECKLIST TO BE COMPLETED BEFORE SENDING NOMINATION PACKAGE TO CPA SK

To ensure that you have followed all the steps and included the appropriate documents in the nomination package for the FCPA, we invite you to complete the checklist below:

To the best of my knowledge, the candidate is eligible for the award

Documents to be forwarded to CPA SK:

- Duly completed FCPA title nomination form (a hard copy or an electronic copy of the nomination package is required)
- The package adequately highlights the candidate's leadership and the outstanding nature of the candidate's performance
- The package adequately highlights the fact that the candidate's achievements make them a recognized leader in the field or activity
- The package unequivocally demonstrates the remarkable or outstanding nature of the candidate's achievement
- The package includes letters of support
- The file highlights the fact that the candidate clearly identifies himself or herself as a CPA and is known and recognized as such, and all supporting documents are enclosed

SECTION 9 - Transmission Methods

Ensure that you have carefully completed the checklist in Section 7.

You are required to submit a hard copy or an electronic copy of the nomination package. Please make sure that the letters of support and other supporting documentation attached or enclosed in the nomination package.

Send the electronic copy of the nomination package to the following e-mail address: rparry@cpask.ca

Please send the hard copy to the address below:

CONFIDENTIAL – FCPA
Attention: Rebecca Parry
Chartered Professional Accountants of Saskatchewan
101-4581 Parliament Avenue
Regina SK S4W 0G3

If you have any questions concerning this process, please contact the CPA SK office at 1-800-667-3535 or email rparry@cpask.ca.