



DRAFT

STRATEGIC PLAN

As prepared by:
Andrée Cusson, CMA
December 10, 2009

Based on Strategic Planning Sessions held:
September 27, 2009, Toronto, ON
October 20, 2009, Langley, BC

TABLE OF CONTENTS

| | |
|---------------------------|---|
| Vision Statement | 3 |
| Mission Statement | 4 |
| Values and Beliefs | 5 |
| Membership Defined | 6 |
| SWOT Analysis | 7 |
| Implementation Strategies | 8 |

VISION STATEMENT

*Advocacy and resources for
Canadian accountants in public practice
and the clients they serve.*

MISSION STATEMENT

CanMapp is a federally incorporated not for profit organization that seeks to improve the environment for Canadian accountants in public practice and the clients they serve. We do this through:

1. Advocacy

- a. Working with the federal and provincial governments towards:
 - i. The harmonization of public accounting standards across Canada.
 - ii. A tiered licensing system that would both protect the public interest and be equitable to accountants in public practice.
- b. Working with the Statutory Regulatory Bodies (SRB's) to:
 - i. Assume the advocacy roll, thus permitting the SRB's to focus on regulating its members.
 - ii. Ultimately create a single accounting designation within Canada.
- c. Working with the public to:
 - i. Raise awareness of pertinent issues.
 - ii. Ensure the best possible relationship between client and accountant.
- d. Working with our members to assist them in creating and sustainable, prosperous and ethical businesses.

2. Resources

- a. Providing information, tools and education to our members which will enhance their working environment; improve their knowledge and skills; promote their practices; and improve client services.
- b. Providing information and assistance to the public in accessing the expertise they require.

VALUES AND BELIEFS

We believe that:

- The public's best interest and those of our members' is paramount to all we do;
- We should remain open minded and objective to differences;
- We should extend co-operation and uphold ethical methods;
- We should invite the use of best practices and innovation; and
- We can exceed expectations by compelling change, not merely embracing it.

Membership Defined

A member of CanMapp is defined to be a person who:

1. Has attained one of the following designations:

- Certified Management Accountant (CMA)
- Chartered Accountant (CA)
- Certified General Accountant (CGA)
- Certified Public Accountant (CPA)

and is a member of good standing with their Statutory Regulatory Body;

2. Has a full or part-time practice based in Canada; and
3. Has paid their annual CanMapp fee.

SWOT ANALYSIS

| | |
|--|--|
| <p style="text-align: center;"><u>STRENGTHS</u></p> <ul style="list-style-type: none"> ■ Dedicated board ■ Diverse membership ■ Expertise from the real world ■ Hands-on experience | <p style="text-align: center;"><u>WEAKNESSES</u></p> <ul style="list-style-type: none"> ■ Volunteer based – more people power needed ■ Weak marketing ■ Stagnate membership ■ Insufficient representation from other provinces and designations |
| <p style="text-align: center;"><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none"> ■ Rostering of accountants ■ Financial support from SRB's (government?) ■ Sharing of templates and business processes | <p style="text-align: center;"><u>THREATS</u></p> <ul style="list-style-type: none"> ■ Competition – 2020 ■ Poor public perception ■ Decline in membership |

Regulations & Legislations

IMPLEMENTATION STRATEGIES

The following goals and objectives were brought forward in both Strategic Planning sessions. They are in no particular order of priority.

1. Change the organization's name to be more inclusive (suggestions were: Canadian Accountants in Private Practice (CAPP) and Accountants in Public Practice (APP))
2. Investigate further and analyze how we can be of better service to all members, in all provinces, and to all designations recognized across Canada.
3. Identify issues, plan response and advocate our memberships' position to the appropriate bodies (government, SRB's)
4. Seek status as a Statutory Body.
5. Improve current insurance and benefits offerings.
6. Revamp and improve website (refer to website committee's recommendations).
7. Partner with some legal representatives who are familiar with SRB complaints processes and can provide guidance and possibly legal representation to members.
8. Encourage mentoring and networking opportunities
9. Find alternative methods of delivering professional development courses to be more inclusive of members across Canada and more cost effective.
10. Seek sponsorships and alliances with companies and associations that are in alignment with our mission statement and are beneficial to our members.
11. Provide substantial discounts to members on CanMapp workshops and events and negotiate discounts for members from other educators.
12. Make it easier for members to update their own profiles in a secure and confidential manner.
13. Increase the membership and encourage more involvement at the board level.
14. Find opportunities to encourage the youth of Canada to enter the accounting profession.