



Treasury Board of Canada
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Canada

Talent and Career Management in the Financial Community



Ryan Pilgrim, Executive Director
Office of the Comptroller General (OCG)

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OCG - FM Community Development Team – Who We Are



We are a team of 9, mostly FIs, focusing on two areas:



Recruitment, Staffing & Special Initiatives

- Sasha Slechta
- Emily Farr
- Shannon Nauss
- Carole Croteau



Career Management and Learning & Development

- Nathalie Fleurent
- Denis Langevin
- Fiona Peters
- Amy Ly
- Herby Damas

Objective

- Build a capable and high performing FM function
- Provide FIs and FM EXs with the information, tools and learning and development activities necessary to succeed.







FM Community – Who You Are



5,400 FIs and



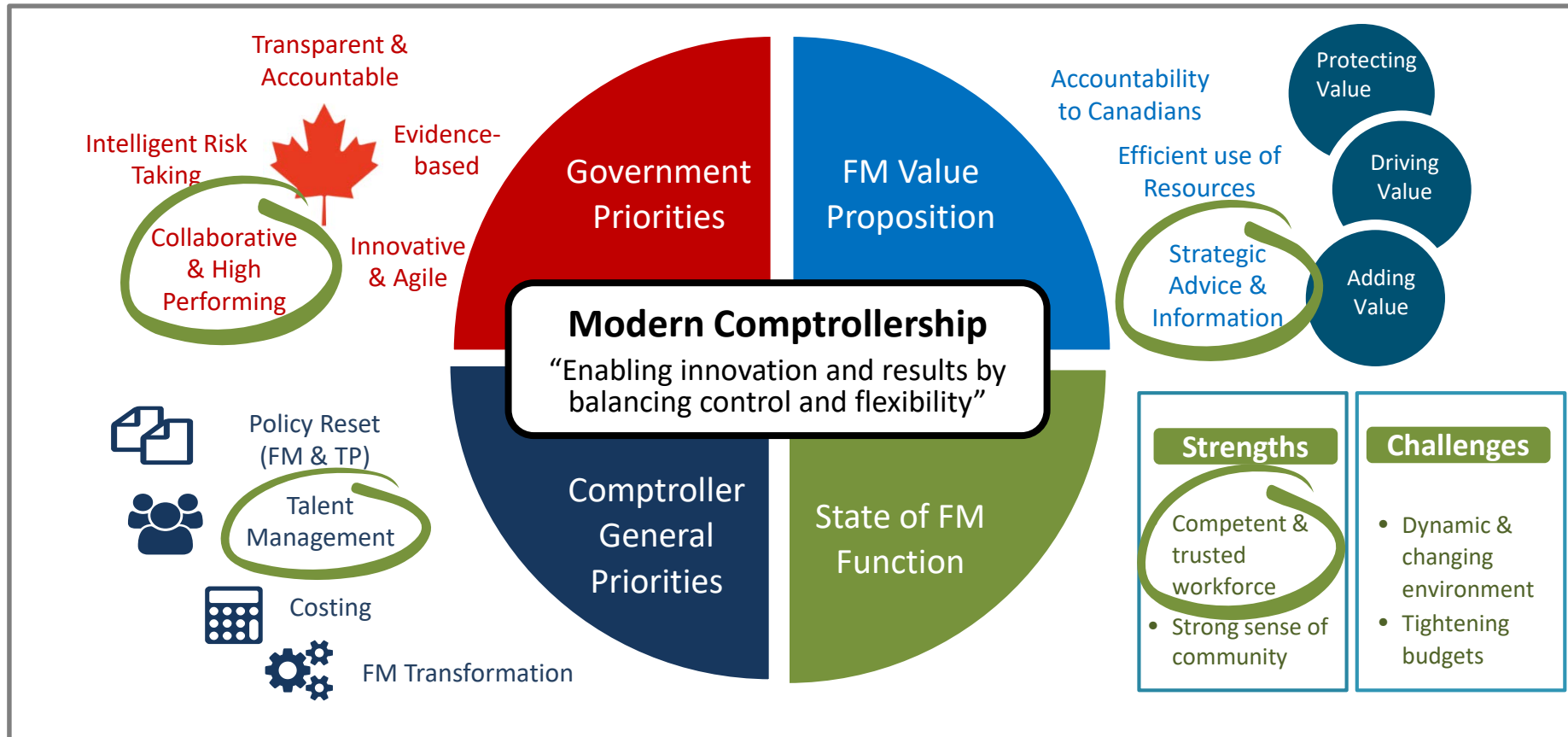
500 EXs.....

Education 	<ul style="list-style-type: none">▪ > 90% have a university degree▪ 52% have a CPA designation (50% for FIs & 75% for EXs)
Gender 	<ul style="list-style-type: none">▪ 59% female, 41% male
Executives 	<ul style="list-style-type: none">▪ 184 CFOs and DFCOs▪ 316 Other Executives
Age 	<ul style="list-style-type: none">▪ 10% are under the age of 30▪ 34% are between 30 and 39▪ 31% are between 40 and 49▪ 25% are 50 or older
Location 	<ul style="list-style-type: none">▪ 70% work in the National Capital Region▪ 30% work in Regions
Growth 	<ul style="list-style-type: none">▪ FI population has increased by 1.1% since 2012

The FM community is well established and connected.

Why is Talent Management so Critical?

Talent Management (TM) is key to creating a dynamic and capable workforce, ensuring that the financial management function is a strategic partner in achieving government priorities.



Talent Management – Taking it to the Next Level

TM Vision for the Government of Canada




Attract, develop and retain high performing financial officers, managers and executives who have the strategic leadership skills, breadth of experience and core financial competencies to lead their organization into the future.

Attract → Develop → Retain

Formal Programs

- FSWEF- Finance Stream – CPA & Non-CPA (*Students*) 
- New university recruitment (FORD) Program (*FI-01*) 
- Advanced Financial Officer Dev. Program (*FI-02 & 03*) 
- Comptrollership Leadership Dev. Program (*FI-04 & EX-01*)
- Next Gen DCFO (*EX-01 & 02*) 
- Next Gen CFO (*EX-03*) 
- Senior Exec. Advanced Fin. & Acct Program (*EX-01 to EX-05*) 

Strategic Initiatives



- Summer Comptrollership Event (*Students*) 
- CPA Firm Recruitment (*FI-02*) 
- Formalized Onboarding Sessions (*FIs & EXs*)
- Collective Staffing Processes (*EXs*)
- Indigenous FM Recruitment Strategy 

Community Management

Governance

- CFO Talent Management Committee 
- Regional Talent Management Committee
- DCFO Quarterly Talent Management Meetings
- Community Monitoring (*e.g. MAF, CPA Snapshot, FMC Inventory*)

Cluster Reviews (EX-01 to EX-03)


- Talent Mapping
- High Performance Promotions 
- Facilitated Moves 

Outreach Activities






- CFO and DCFO Conferences
- DCFO Monthly Conference Calls
- Departmental CFO Management Meetings
- Touch Base Meetings

Foundational


Strategic Integration

- International FM Forum
- Provincial Comptrollers Working Group
- FM Learning Providers Committee (*CPA, FMI, CSPA, ACFO*) 

Enabling Tools

- CFO PMA Objectives 
- Mentoring Tool Kit 
- Succession Planning 
- Coordinated staffing 
- CFO Guideline 

Career Management

- FI Competency Standard
- FI Core Curriculum – *Online courses*
- FI to CFO Career Path
- Career Pathways Portal 

Expected Result Agile and sustainable government-wide financial management workforce.

Talent Management – Areas of Focus

A

Talent Infusion: Recruitment & Staffing



Only 10% of FM community is under the age of 30.
Significant portion of the community is eligible to retire in the coming years



Marketing and branding the GoC as an ***Employer of Choice*** and competing with the private sector for talent.

B

Development Programs



Lack of accessible programs to develop staff and prepare FI's for the next stages of their career.



Offer Financial Management development programs at all levels that prepare participants to succeed at the next level in their career path.

C

Talent and Career Management



Increasingly complex operating environment calls for the FIs and EXs to transform their role from *financial advisor* to *strategic business partner*.

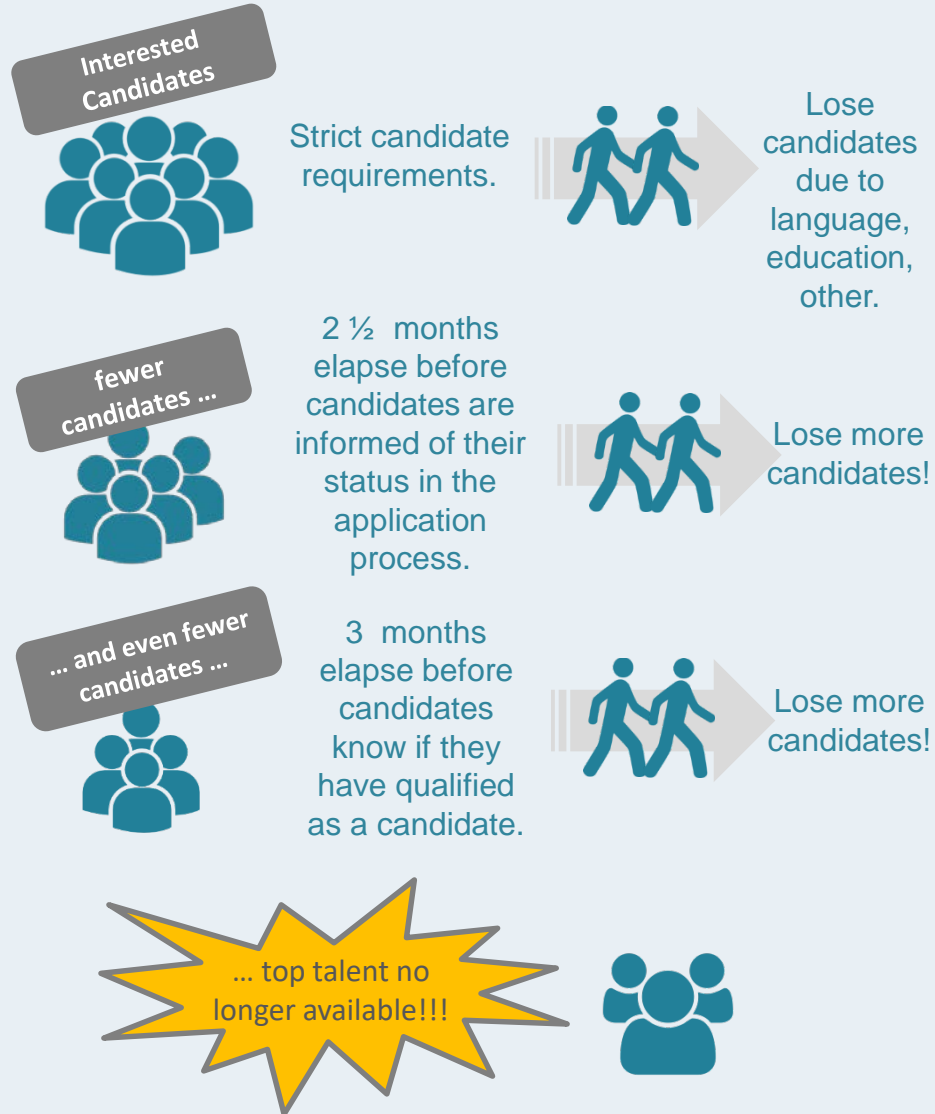


Enhance information, tools and processes to assist FIs and EXs in assessing and developing their skills.

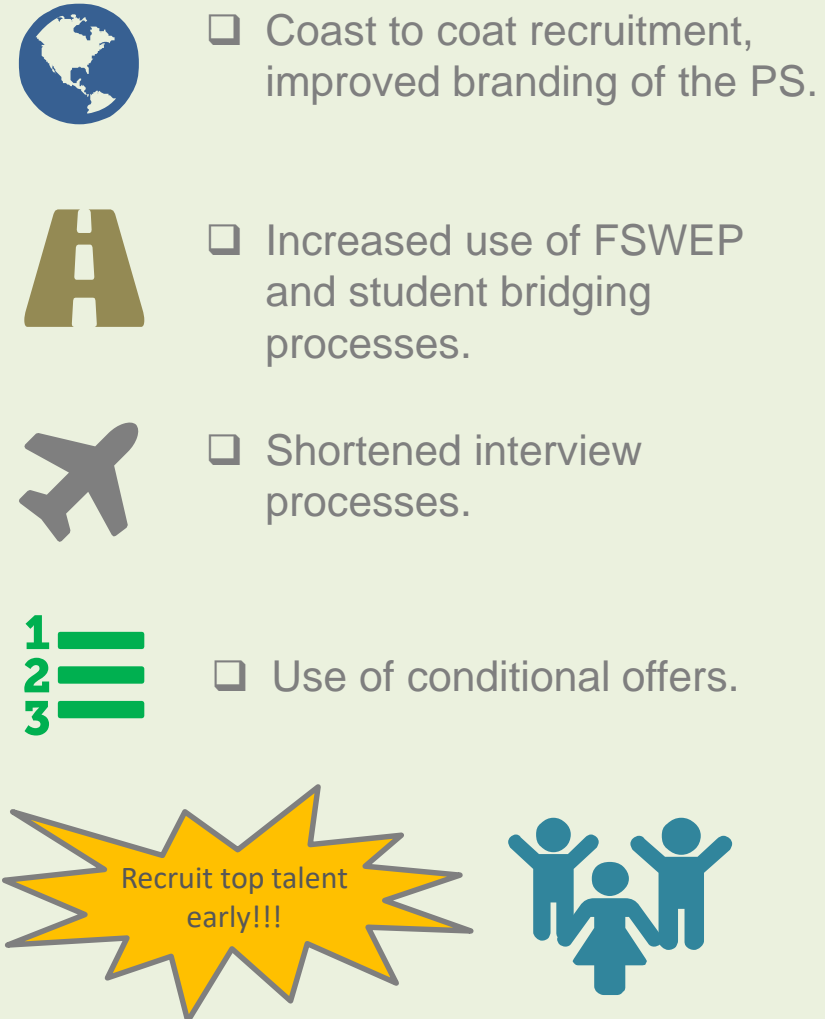
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Talent Infusion: Transformation of Recruitment & Staffing

Old Process

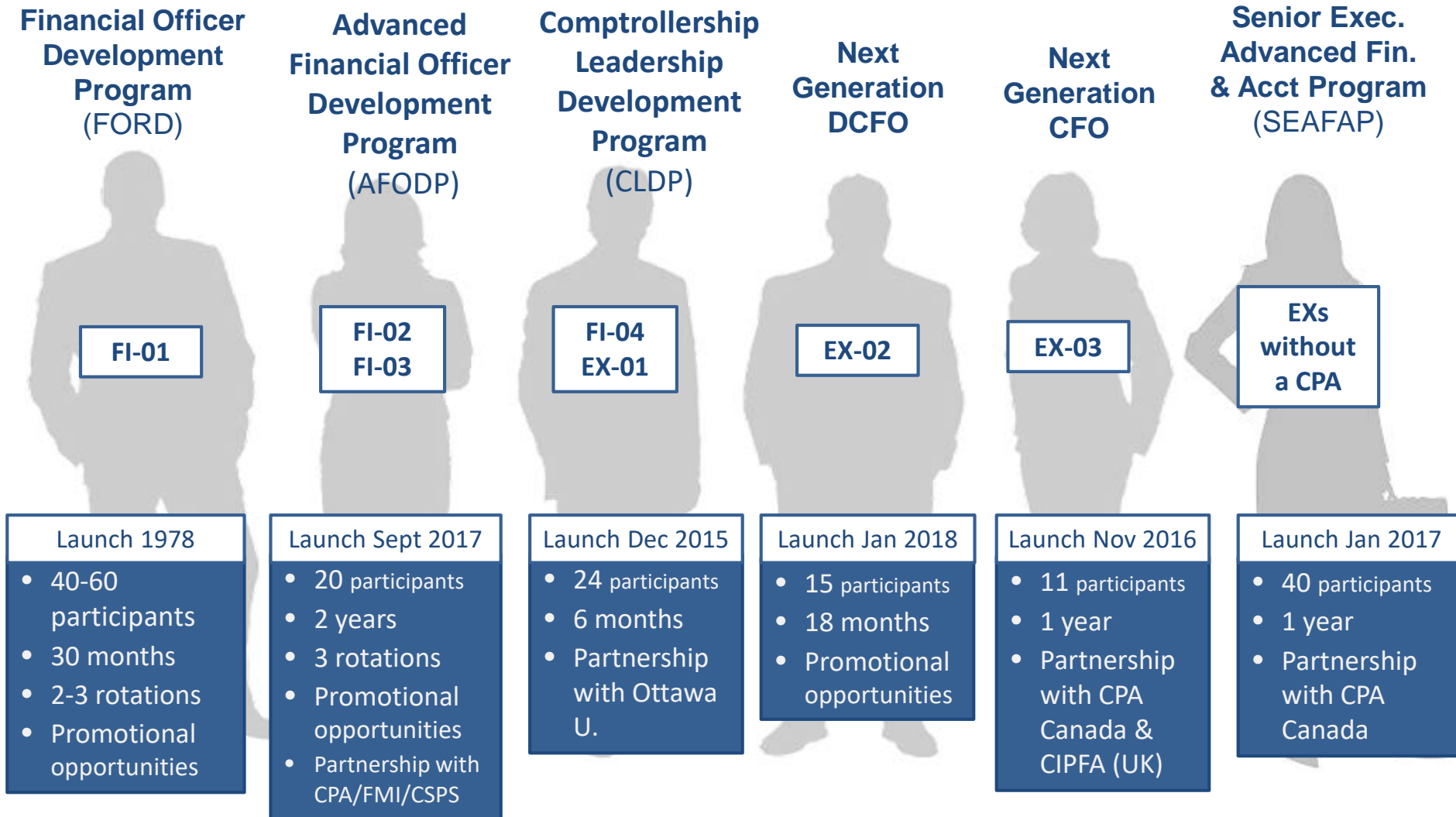


New Process





Development Programs – For All Levels

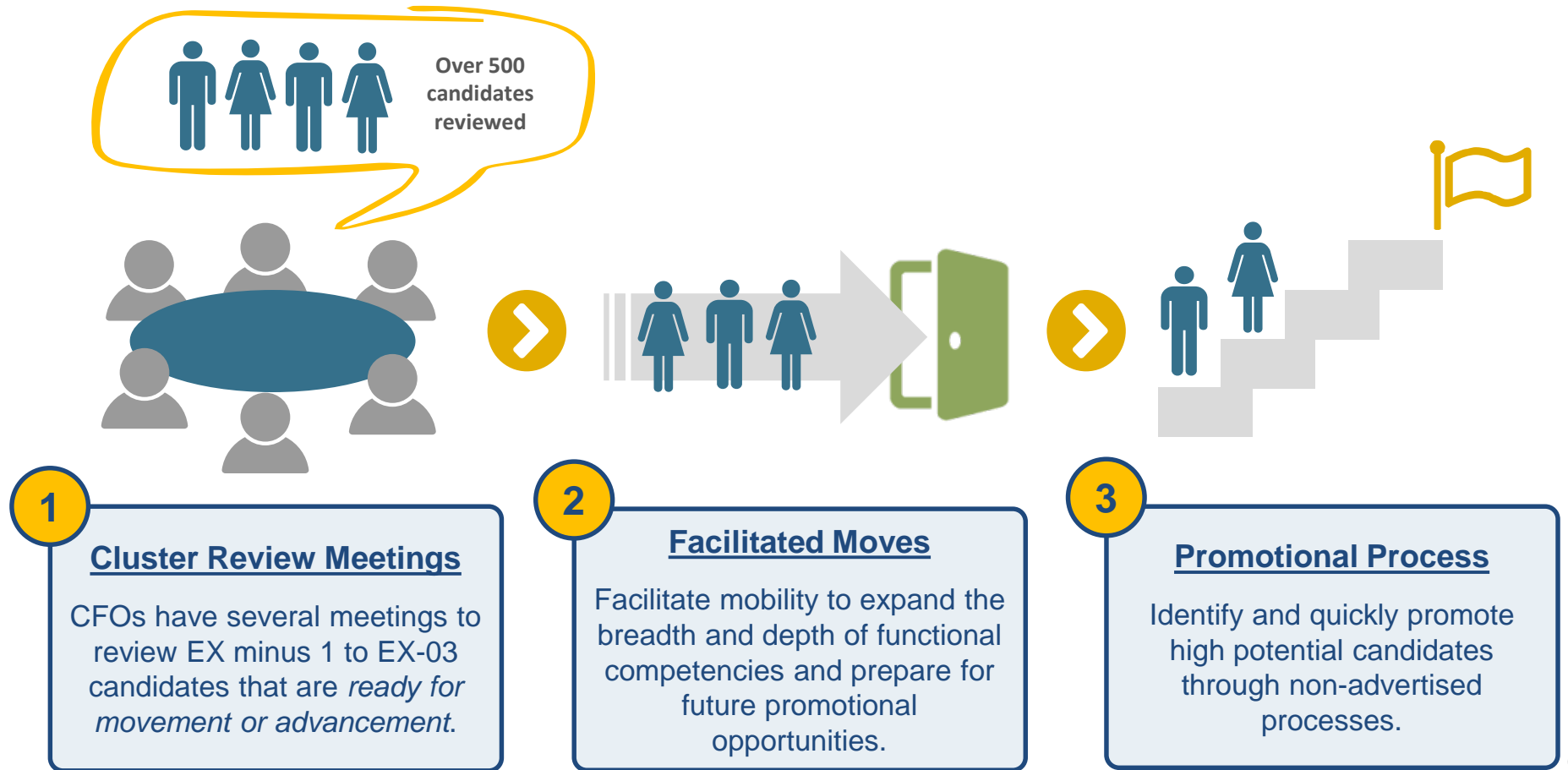


Financial Management development programs are offered at all levels.



Strengthen Financial Management through:

- Facilitated moves and promotional process.
- Placement of top talent outside of their home departments to broaden the breadth of their experience



The **FM Career Development Portal** is designed to support individual career planning and development, providing:

1. Information in an easy-to-find and user-friendly platform (GCPEDIA);
2. Requirements and expectations to succeed at current & next levels; and
3. Ability to self-assess competencies and links to targeted learning and development programs to address gaps.

Key Components of the Career Development Portal

FI to CFO Career Path



Summary of behavioral and functional competencies, experience, and expectations at each level.

Community Profiles



Career paths of community members through infographics and videos to convey practical advice.

Self-Assessment



Self-assess competencies, experience and qualifications, highlight gaps and identify learning activities.

Career Development Portal – Welcome Page

Financial Management Community Career Development Portal

Welcome to the Career Development Portal!

The Portal provides a one-stop shop to assist you in planning your career path to unlock your potential and reach your career aspirations. Click on the image to hear from Bill Matthews the Comptroller General of Canada, on the importance of career management.



FI to CFO
Career Path



Development
Tools



Learning
Activities



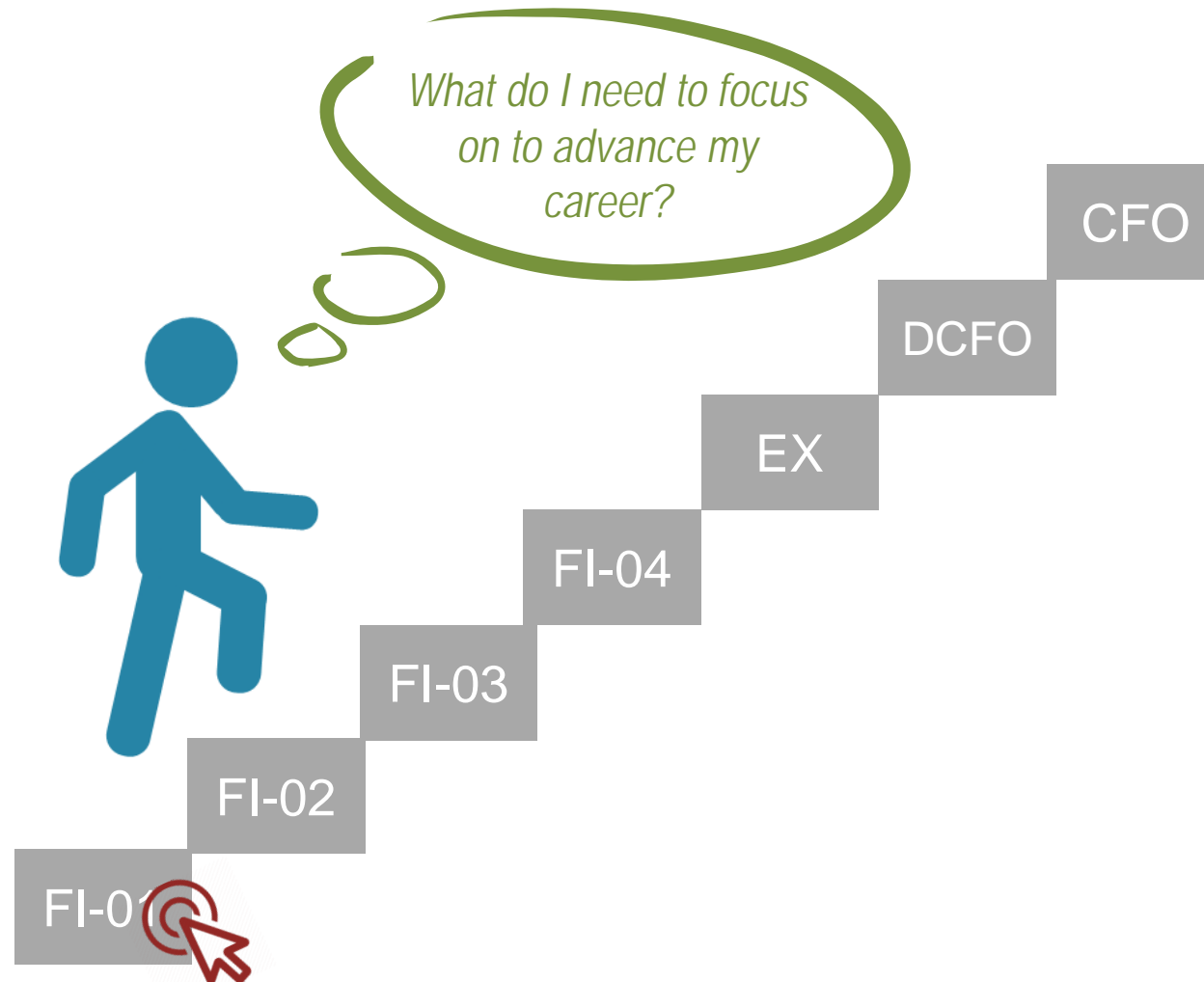
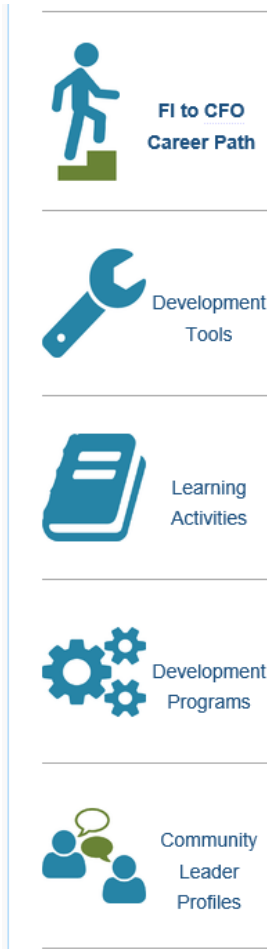
Development
Programs



Community Leader
Profiles

Career Development Portal – FI to CFO Career Path

FI to CFO Career Path



Foundational Development – FI-1 Level

About the FI-01 level

As a financial management professional, you are expected to participate in and contribute toward the achievement of your team's goals and objectives. You are also expected to manage yourself and your work appropriately.

Qualifications

- **Education:** two-year post-secondary program with a specialization in either: accounting, finance, commerce, business administration or economics
- **Professional accreditation:** not required at this level; however, it is viewed as a desirable qualification
- **Bilingual capacity:** desirable at this level but not required for all positions

Years at Level: 2

Focus for Development

- Building foundational knowledge
- Increasing knowledge of how government works
- Developing technical skills and abilities
- Developing technical competencies within your functional area
- Ensuring your behaviours demonstrate your proficiency in being able to manage yourself and your work.

Talent Management Activities

- Financial Officer Recruitment and Development (FORD) Program

FI Core Curriculum

The Office of the Comptroller General (OCG), in collaboration with the Canada School of Public Service (CSPS), has developed a core curriculum for the Financial Management community. Within the core curriculum is a list of required training for all new financial officers in government. These courses were designed to provide an understanding of the financial fundamentals and key knowledge standards.

- F111 - Finance
- F112 - Governance
- F113 - Financial Management
- F304 - Integrated

More information is available on the Financial Management website.

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Experience To Gain At This Level

Functional Experience

a) Financial Planning	Essential, one of a) to i)
b) External Reporting	
c) Internal Resource Management	
d) Advisory Services	
e) Accounting Operations	
f) Financial Systems	
g) Financial Policy	
h) Costing	
i) Internal Controls	


Breadth of Experience

a) Program and corporate service delivery	NA
b) Departmental diversity	NA
c) Central agency	NA
d) Regional	NA

Understand what are the key factors to succeed at your current level and be ready to take on the challenges in the next one:

- ☐ What is expected of you;
- ☐ Education, professional accreditation, bilingual capacity;
- ☐ What training is required;
- ☐ The number of years and experiences to acquire.

Foundational Development - FI-1 Level

Behavioural Competencies	
Oral and Written Communication  [Collapse]	Strategic Thinking: Ideas [Expand]
Competency Definition	Engagement [Expand]
<ul style="list-style-type: none">• Listening to others and communicating articulately through speech or in writing.	Management Excellence: Action [Expand]
Key Indicators for FI-01	Management Excellence: People [Expand]
<ul style="list-style-type: none">• Listens and questions effectively• Shares information willingly• Responds constructively to diverse views• Writes clearly and concisely, using appropriate vocabulary and grammar and message is easily understood• Maintains timely communications honestly and respectfully• Communication flow is logical and presents a reasonable sequence of thoughts	Management Excellence: Finance [Expand]
Risk Management [Expand]	
Negotiation/Persuasion [Expand]	
Values and Ethics [Expand]	
Strategic Thinking: Analysis [Expand]	

- ☐ Easily access the behavioral competencies for FIs.
- ☐ Understand the behaviors to acquire to be considered proficient at each level.

Career Development Portal – Development Tools

Development Tools



Development Tools – Self Assessment

Candidate Self Assessment

A

ASSESS CURRENT PROFILE

Current Level

FI-02

Desired Level

FI-03

Years in Current Position

3 years

Education

Undergraduate

Professional Designation

None

Bilingual Profile

Reading

A

Writing

B

Oral

B

Start / Refresh

View Results

☐ Enter information about your current status.

☐ The *Desired Level* is the next level up from your current level.

Development Tools – Self Assessment

B

ASSESS FUNCTIONAL EXPERIENCE

☐ **Sufficient experience** is considered to be one complete budgetary or management cycle.

☒ Financial planning
☐ External reporting
☐ Internal resource management
☒ Advisory services
☐ Accounting operations
☐ Financial systems
☐ Financial policy
☐ Costing
☐ Internal controls

☐ Indicate the type of **functional experience** you have had in your career so far.

C

ASSESS BREADTH OF EXPERIENCE

☐ Program and Corporate Service Delivery
☒ Departmental diversity
☐ Central agency
☐ Regional
☐ Financial Management complexity
☐ Managerial
☐ Internal or external audit

☐ Indicate the **breadth of experience** you have had in your career do far.

Development Tools – Self Assessment

D

ASSESS BEHAVIORAL COMPETENCIES

INSTRUCTIONS

1. Evaluate the proficiency level for each of the 10 BEHAVIORAL COMPETENCIES by clicking on 1 of the 4 proficiency levels: **Insufficient**, **Basic**, **Proficient**, or **Advanced**

1. Oral and Written Communication

Presents ideas clearly and persuasively.

Listens to others and provides a balanced response.

Maintains open and continuous communication.

Communicates in a manner that generates enthusiasm.

☐ Insufficient

☐ Basic

☒ Proficient

☐ Advanced

Confirm

Describes financial issues clearly for non-financial audiences.

Builds a consensus and addresses diverse views.

Delivers consistent and clear messages in presentations.

Defends and/or secures support for ideas or initiatives.

☐ Insufficient

☐ Basic

☒ Proficient

☐ Advanced

Confirm

2. Risk Management

Applies experience to assesses risks and impacts.

Analyzes alternative outcomes of options to minimize risks.

☐ Insufficient

☒ Basic

☐ Proficient

☐ Advanced

Confirm

☐ Assess your behavioral competencies.

☐ To be successful at the next level, one should be proficient at their current level.

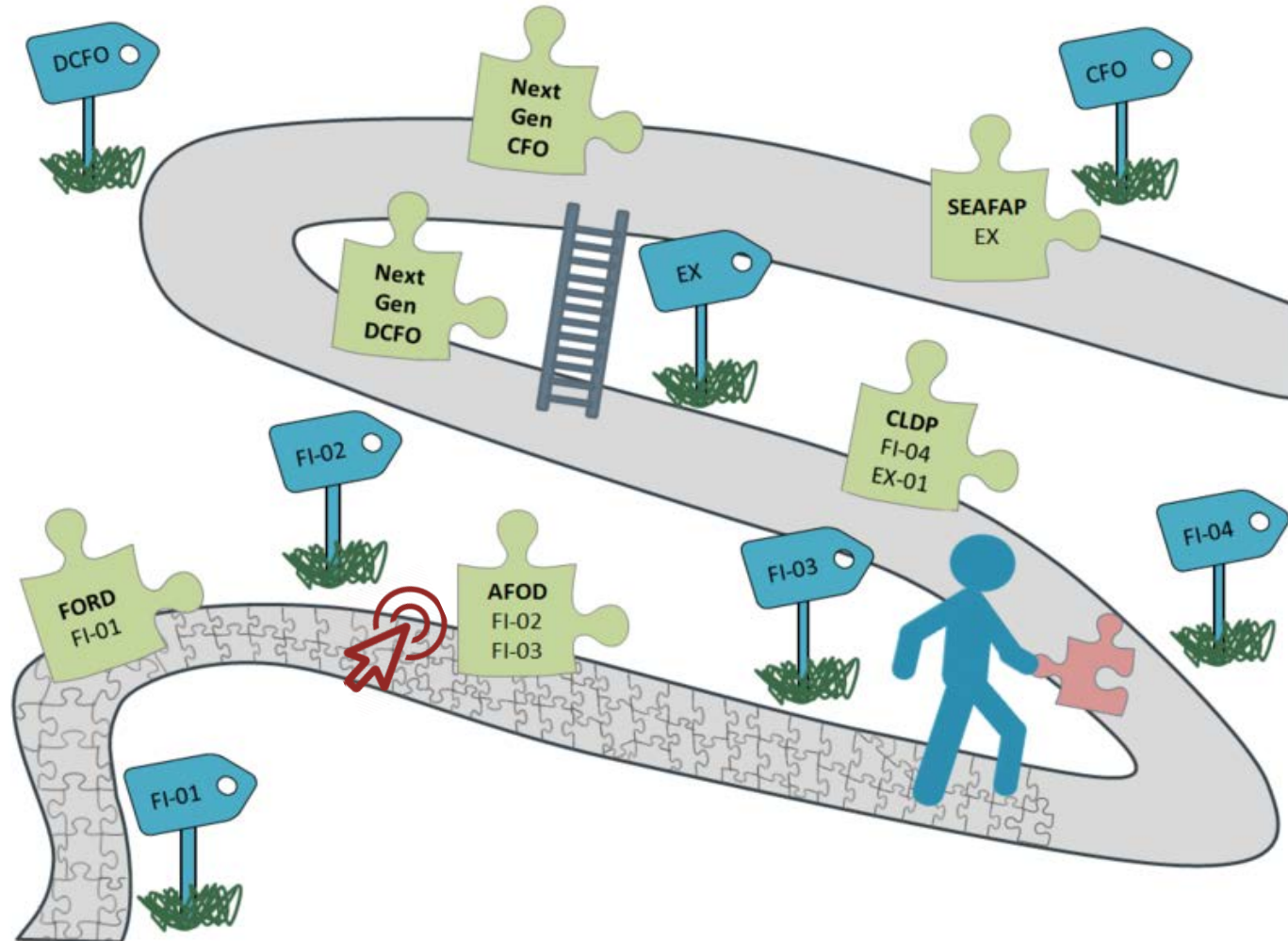
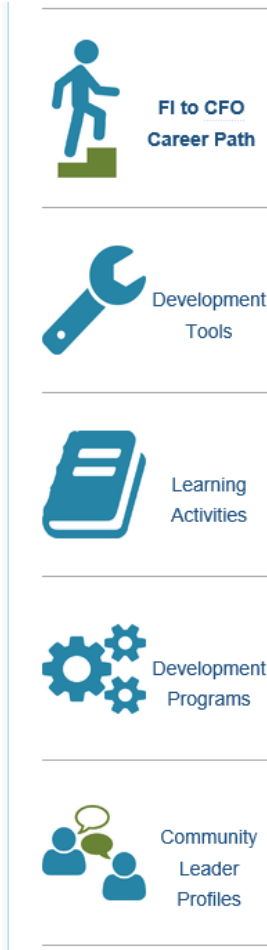
Self Assessment – Gap Analysis & Recommendations

C BREADTH OF EXPERIENCE		Response	Analysis	Recommendation	Learning & Development Activities
Program and Corporate Services	No Experience	Not Met	At this level it is desirable to have breadth of experience in one or more of the following areas: 1. Program and corporate service delivery 2. Departmental diversity 3. Regional 4. Financial management complexity 5. Managerial	Visit the Career Development Portal to learn more about development programs and upcoming staffing processes to diversify your experience: 1. OCG Development Programs - http://www.gcpedia.gc.ca/wiki/Financial_management_community/Career_Development_Portal/Development_Programs 2. Recruitment and Staffing - http://www.gcpedia.gc.ca/wiki/Financial_management_community/Recruitment_Programs	
Departmental diversity	Experience Acquired				
Central agency	No Experience				
Regional	No Experience				
Financial Management complexity	No Experience				
Managerial	No Experience				
Internal or external audit	No Experience				
D BEHAVIORAL COMPETENCIES		Current Level	Desired Level	Recommendation	Learning & Development Activities
Oral and Written Communication	Proficient	Proficient	Meets Competency Requirement	No further development recommended at the FI-02 and FI-03 level. Visit the Career Development Portal to view recommended learning activities to improve behavioral proficiencies: http://www.gcpedia.gc.ca/wiki/Financial_management_community/Career_Development_Portal/FI_to_CFO_Career_Path/FI-02	
Risk Management	Basic	Insufficient	Does not meet Competency requirement		
Negotiation/ Persuasion	Proficient	Basic	Further development of competency desirable		
Values and Ethics	Basic	Insufficient	Does not meet Competency requirement		
Strategic Thinking - Analysis	Advanced	Basic	Further development of competency desirable		
Strategic Thinking - Ideas	Basic	Insufficient	Does not meet Competency requirement		
Engagement					
Management					
Management					

❑ Results from your assessment can be used to inform performance management discussions, learning plans, career planning etc.

Career Development Portal – Development Programs

Development Programs



Advanced Financial Officer Development Program (AFOD)

1

Want to learn the skills necessary to succeed as a supervisor or manager?

Self-Evaluation

- On-line competency self-assessment
- Validate competency proficiency
- Promotional opportunity

Rotational Assignments

- Three rotations (8 months each):
#1 in a new FM functional area
#2 in a program or regional office
#3 in a FM functional area in another Dept.



Competency Development

Focus on leadership competency areas:

1. People Management & Engagement;
2. Communication;
3. Strategic Thinking Analysis & Ideas

Targeted Learning

- Mentoring
- Facilitated learning discussions;
- Action Learning Sets
- Webinars - CPA/FMI

Participant Profile and Enrollment Overview

Eligibility

- **FI-02 or FI-03** with a degree specialization in *Accounting, Finance, Business Administration, Commerce or Economics* **OR** is in possession of or be working towards a CPA designation.
- Minimum of 12 months experience at current group and level.
- Achieved minimum of "Succeeded" rating in their most recent PMA.
- Language profile - BBB.

Selection Process

- Participants nominated by immediate supervisor, approved by the CFO and assessed by the OCG.

of Participants & Duration

- 20 participants enrolled for 24 months.



Career Development Portal – Learning Activities



FI to CFO
Career Path



Development
Tools



Learning
Activities



Development
Programs



Community
Leader
Profiles



Consolidate learning activities from various providers by:

- Level (FI / EX)
- Behavioral and Functional Competencies
- Hot Topics

Career Development Portal – Community Leader Profiles

Community Leader Profiles



FI to CFO
Career Path



Development
Tools



Learning
Activities



Development
Programs



Community
Leader
Profiles



Roch Huppé
CFO
Canada Revenue
Agency



Patricia Sauvé-McCuan
CFO
Natural Sciences and Engineering
Research Council



Arun Thangaraj
CFO
Global Affairs
Canada



Serena Francis
Executive Director
Financial Management Services
Health Canada



Eva Jacobs
DCFO
Public Service
Commission

Coming Soon



*Your Name
Your Position
Your Department*

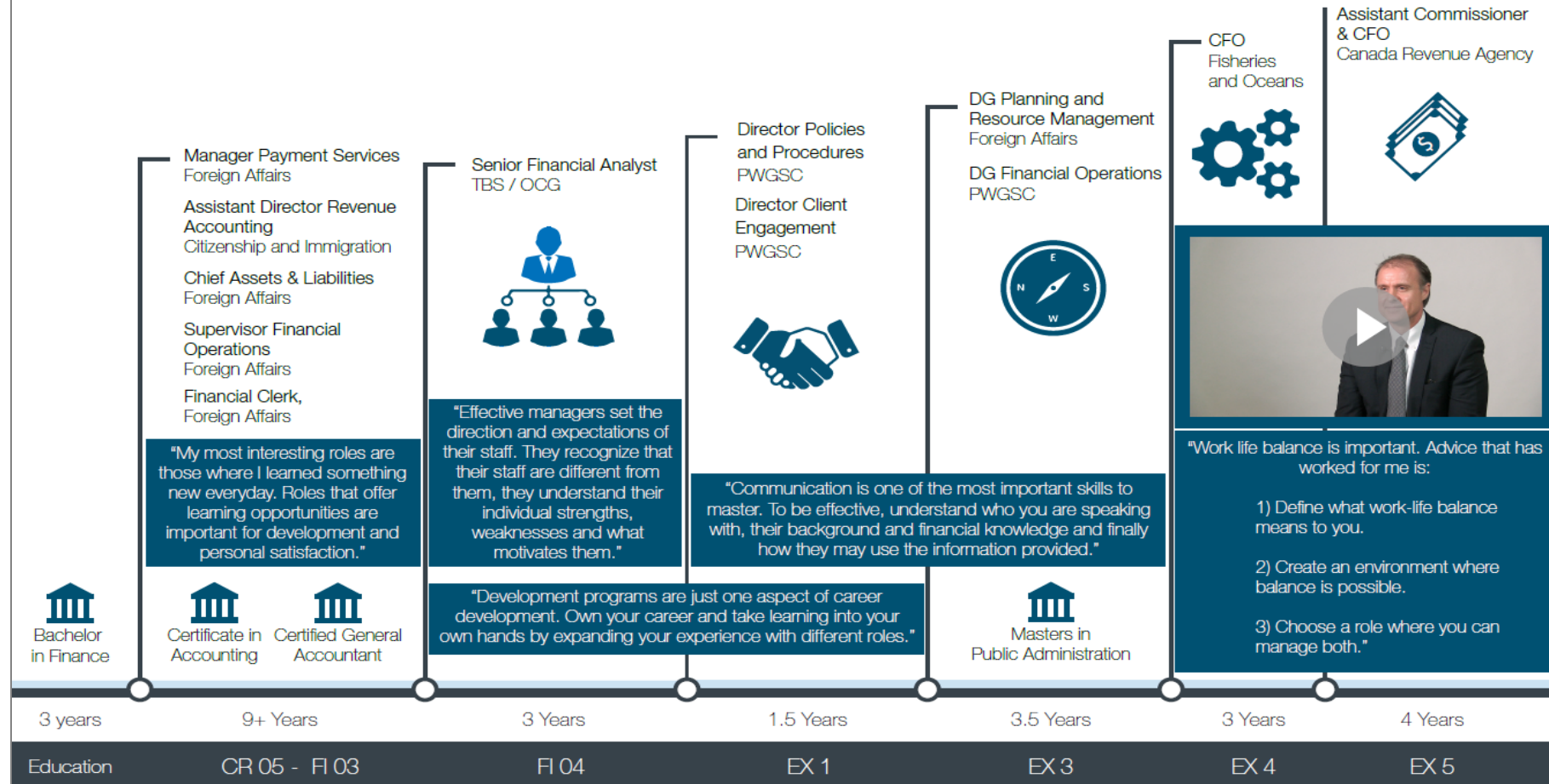
Career Path: Roch Huppé, Assistant Commissioner & CFO

Canada Revenue Agency

Career Path

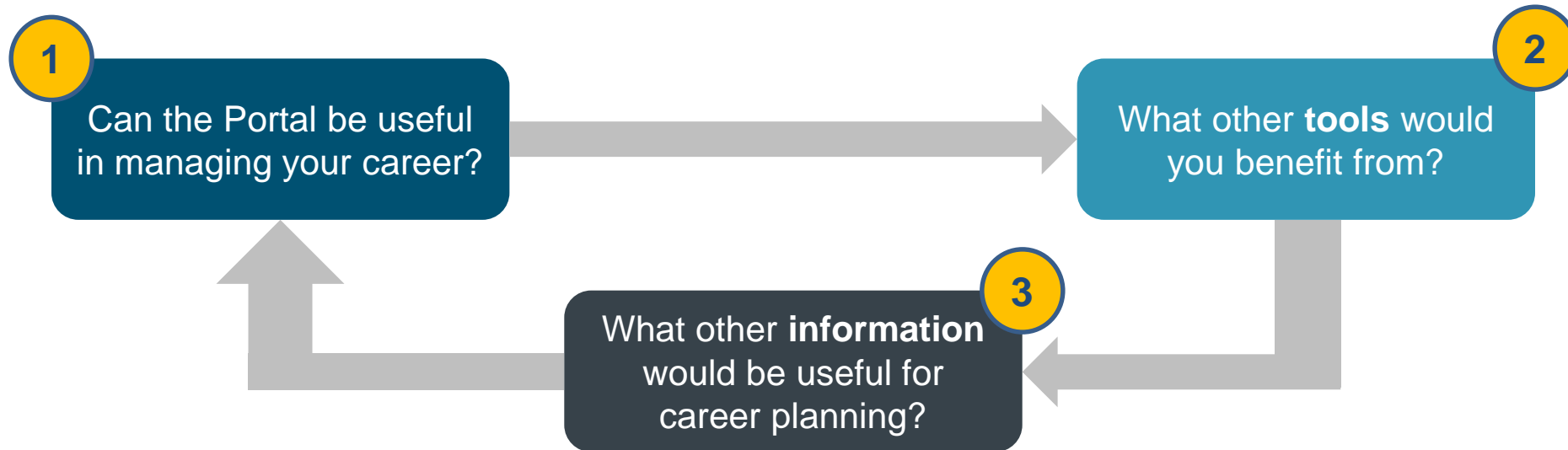
Roch Huppé

Assistant Commissioner & CFO
Canada Revenue Agency



We Want Your Feedback!!!

- ❑ The Career Development Portal will launch in the early fall on GCPEDIA.
- ❑ Marketing efforts will include attending department town halls, promotion at OCG events etc.
- ❑ Your input is essential to ensure that the Portal is relevant and useful for financial officers.



Contact us at zzfmcd@tbs-sct.gc.ca, we want your feedback!

Questions



Ryan Pilgrim

Executive Director,
Financial Policy and Community
Development

Ryan.Pilgrim@tbs-sct.gc.ca

(613) 369-3113



Alexandre (Sasha) Slechta

Acting Director,
Financial Policy and Community
Development

Alexandre.Slechta@tbs-sct.gc.ca

(613) 698-5681