



Treasury Board of Canada  
Secrétariat

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du Canada

Canada

# Talent and Career Management in the Financial Community



Shannon Nauss  
Financial Management Community Development  
Office of the Comptroller General (OCG)

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# OCG - FM Community Development Team – Who We Are



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



## Recruitment, Staffing & Special Initiatives

- FORD / Students
- Collective Staffing
- Career Development Portal
- Special Initiatives



## Career Management and Learning & Development

- Next Gen Development Programs
- Cluster Reviews
- Onboarding
- Joint Career Development Program

### 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



- **> 90%** have a university degree
- **52%** have a CPA designation (**50%** for FIs & **75%** for EXs)

Gender



- **59%** female, **41%** male

Executives



- **184** CFOs and DFCOs
- **316** Other Executives

Age



- **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



- **70%** work in the National Capital Region
- **30%** work in Regions

Growth

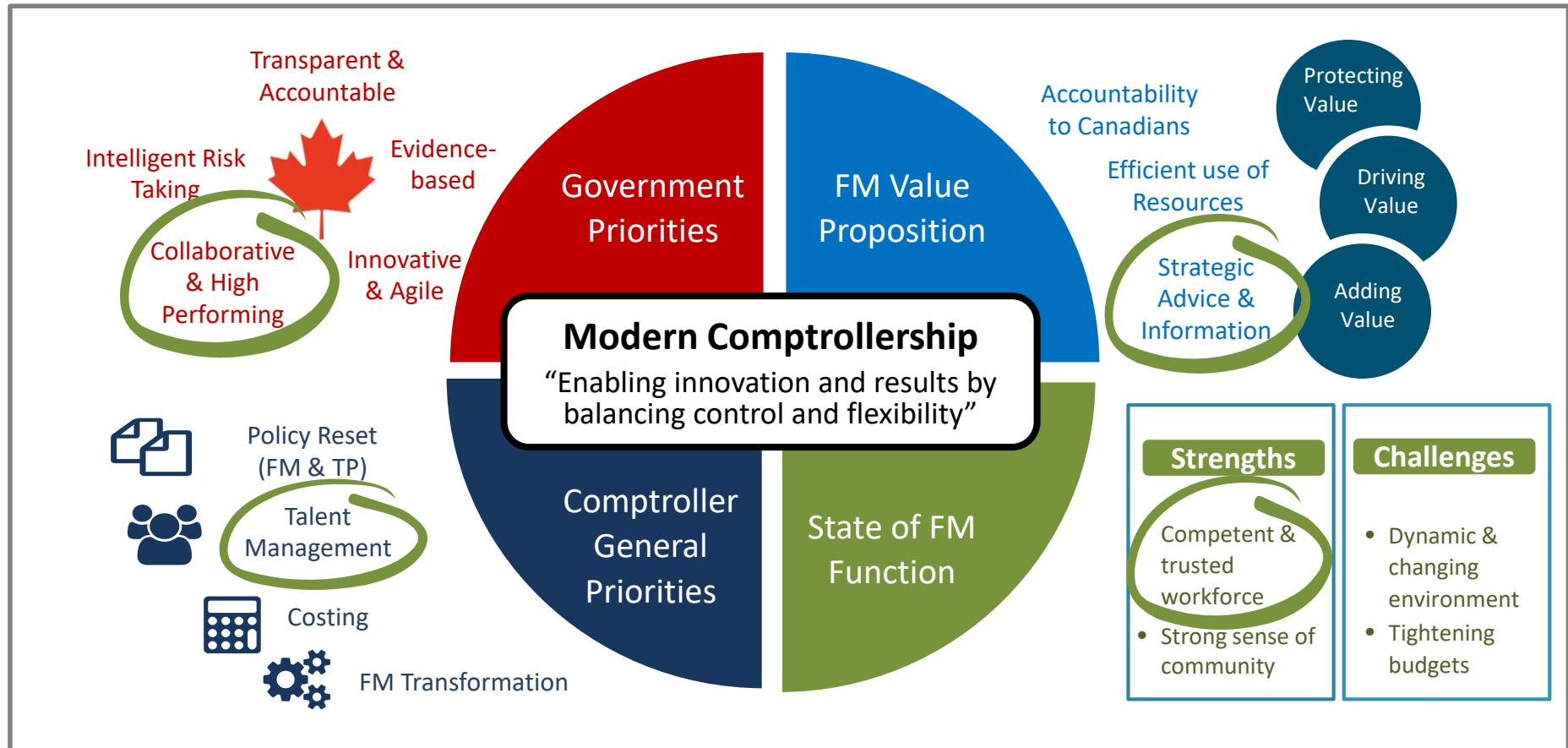


- FI population has increased by **1.1%** since **2012**

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, critical to 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

- FSWEP- 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, CSPS, 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.

# A

# Talent Infusion: Transformation of Recruitment & Staffing

## Old Process ....

Interested Candidates



Strict candidate requirements.



Lose candidates due to language, education, other.

fewer candidates ...



2 ½ months elapse before candidates are informed of their status in the application process.



Lose more candidates!

... and even fewer candidates ...



3 months elapse before candidates know if they have qualified as a candidate.



Lose more candidates!



## New Process ....



Coast to coast recruitment, improved branding of the PS.



Increased use of FSWEP and student bridging processes.



Shortened interview processes.



Use of conditional offers.



# Development Programs – For All Levels

## Financial Officer Development Program (FORD)



**FI-01**

- Launch 1978
- 40-60 participants
- 30 months
- 2-3 rotations
- Promotional opportunities

## Advanced Financial Officer Development Program (AFODP)



**FI-02  
FI-03**

- Launch Sept 2017
- 20 participants
- 2 years
- 3 rotations
- Promotional opportunities
- Partnership with CPA/FMI/CSPS

## Comptrollership Leadership Development Program (CLDP)



**FI-04  
EX-01**

- Launch Dec 2015
- 24 participants
- 6 months
- Partnership with Ottawa U.

## Next Generation DCFO



**EX-02**

- Launch Jan 2018
- 15 participants
- 18 months
- Promotional opportunities

## Next Generation CFO



**EX-03**

- Launch Nov 2016
- 11 participants
- 1 year
- Partnership with CPA Canada & CIPFA (UK)

## Senior Exec. Advanced Fin. & Acct Program (SEAFAP)



**EXs  
without  
a CPA**

- Launch Jan 2017
- 40 participants
- 1 year
- Partnership with CPA Canada

Financial Management development programs are offered at all levels.



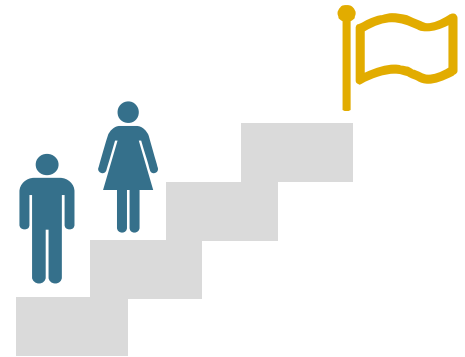
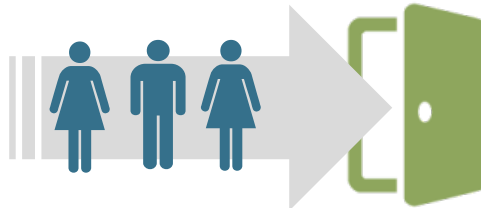
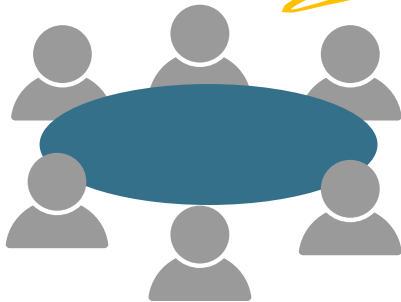


## Strengthen Financial Management through:

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



Over 500  
candidates  
reviewed



1

### Cluster Review Meetings

CFOs have several meetings to review EX minus 1 to EX-03 candidates that are *ready for movement or advancement*.

2

### Facilitated Moves

Facilitate mobility to expand the breadth and depth of functional competencies and prepare for future promotional opportunities.

3

### Promotional Process

Identify and quickly promote high potential candidates through non-advertised processes.

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 – Link

www.gcpedia.gc.ca

**GCpedia**  
Information at your fingertips

Navigation  
Main Page  
Communities  
Projects  
Lexiconapedia  
Browse categories  
Recent changes  
Random page  
Tag cloud

Support

**IN THE SPOTLIGHT**

**January 2018 is Mentoring Month!**

Take part in mentoring month activities in January 2018 by sharing your positive mentoring experiences using #MentoringMonth on social media sites! Find your mentor or mentee with the [Opportunities Platform on GConnex](#) or on [GCcollab](#) which connects all levels of public servants, academics, retirees and students.

For more information on Mentoring Month, please visit our [GCpedia](#) page.

Previous Spotlights | How to add a Spotlight

**GCTools**  
Your knowledge at work

GCTools Information Sessions

Financial management community/Career Development Portal

# 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 here to hear an introduction to the Career Development Portal and the importance of managing your career.](#)



FI to CFO  
Career Path



Development  
Tools



Learning  
Activities



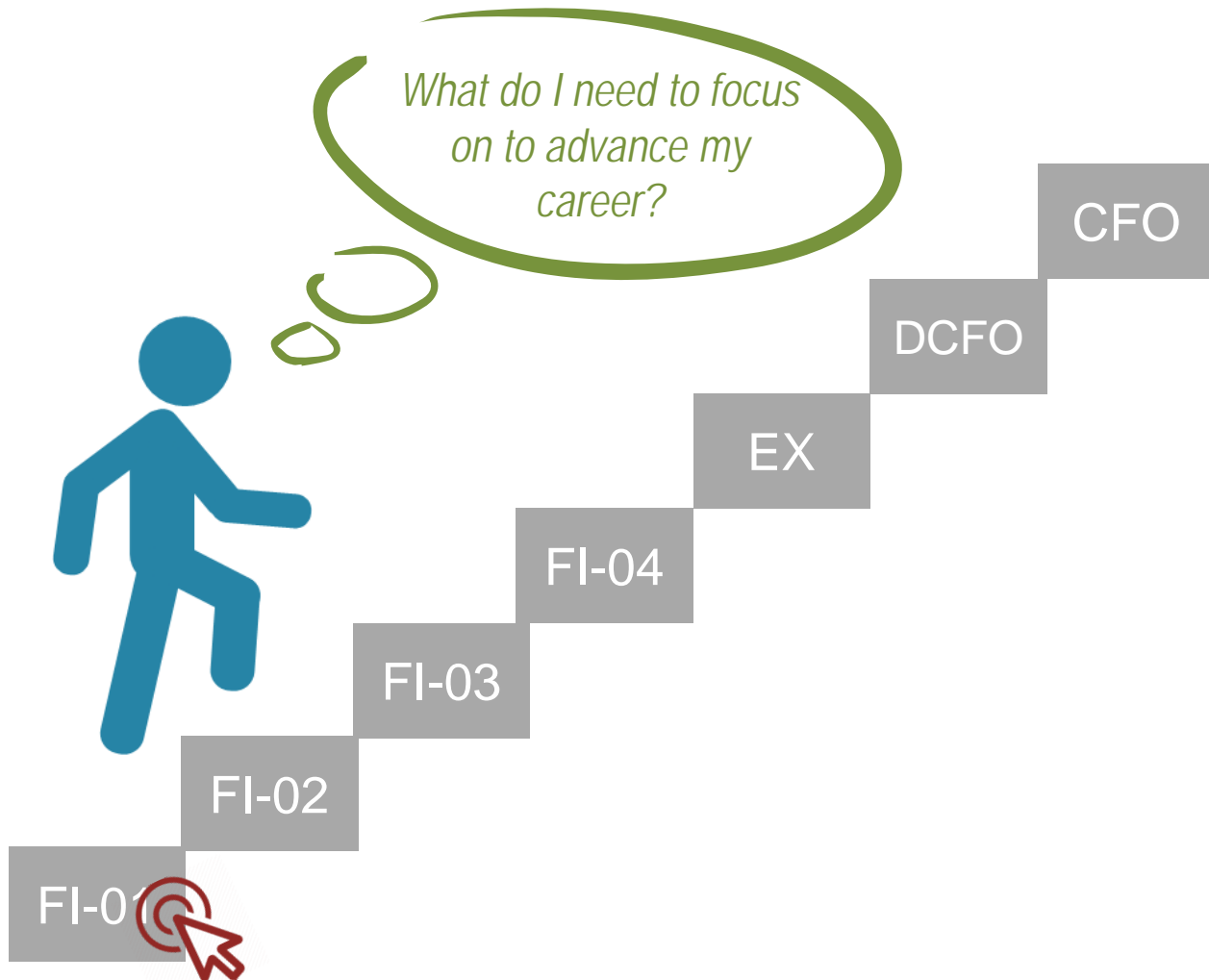
Development  
Programs



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 - Government
- F113 - Financial
- F304 - Integrating

More information on the Financial Management website.

More information on training outlines training

## 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.

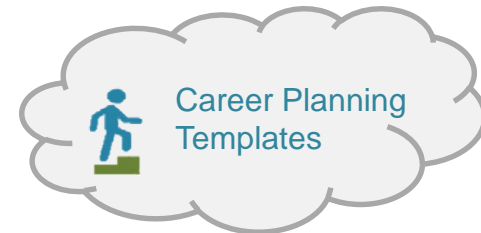
# Foundational Development - FI-1 Level

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

- 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	<input type="text" value="FI-02"/>
Desired Level	<input type="text" value="FI-03"/>
Years in Current Position	<input type="text" value="3 years"/>
Education	<input type="text" value="Undergraduate"/>
Professional Designation	<input type="text" value="None"/>
Bilingual Profile	
<i>Reading</i>	<input type="text" value="A"/>
<i>Writing</i>	<input type="text" value="B"/>
<i>Oral</i>	<input type="text" value="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 BEHAVIORIAL 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 - <a href="http://www.gcpcedia.gc.ca/wiki/Financial_management_community/Career_Development_Portal/Development_Programs">http://www.gcpcedia.gc.ca/wiki/Financial_management_community/Career_Development_Portal/Development_Programs</a>  2. Recruitment and Staffing - <a href="http://www.gcpcedia.gc.ca/wiki/Financial_management_community/Recruitment_Programs">http://www.gcpcedia.gc.ca/wiki/Financial_management_community/Recruitment_Programs</a>
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			

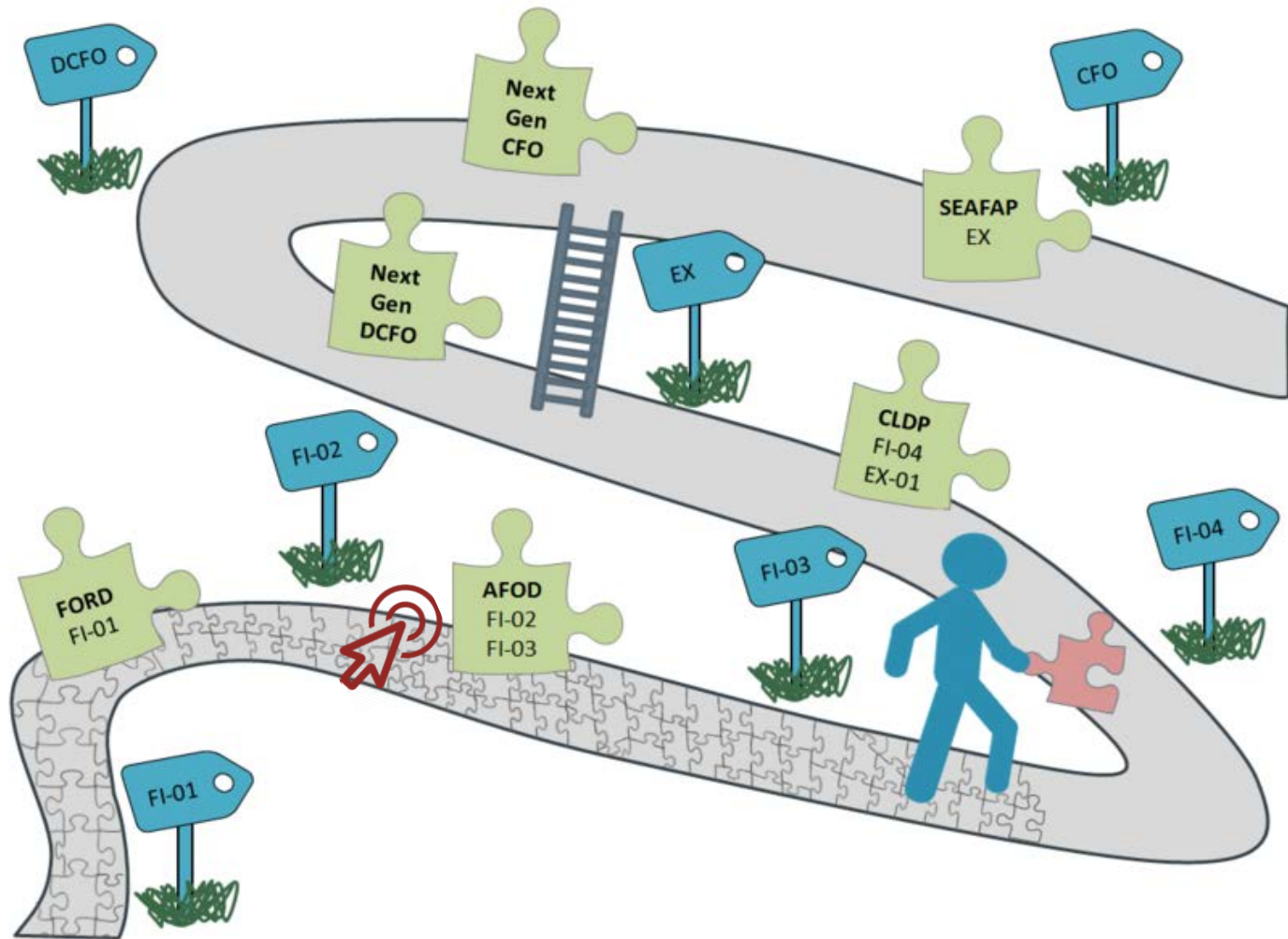
## D BEHAVIORAL COMPETENCIES

	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: <a href="http://www.gcpcedia.gc.ca/wiki/Financial_management_community/Career_Development_Portal/FI_to_CFO_Career_Path/FI-02">http://www.gcpcedia.gc.ca/wiki/Financial_management_community/Career_Development_Portal/FI_to_CFO_Career_Path/FI-02</a>
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.



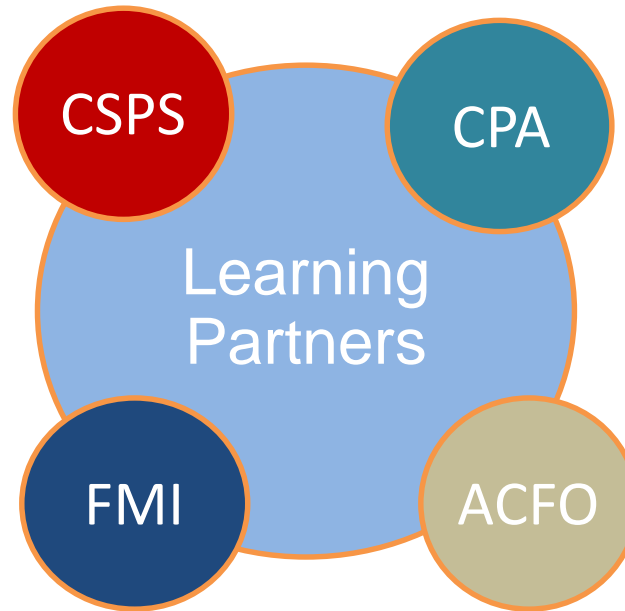
# Career Development Portal – Learning Activities



Webinars

In-Class  
Sessions

PD Week



Conferences

Online  
Courses



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*

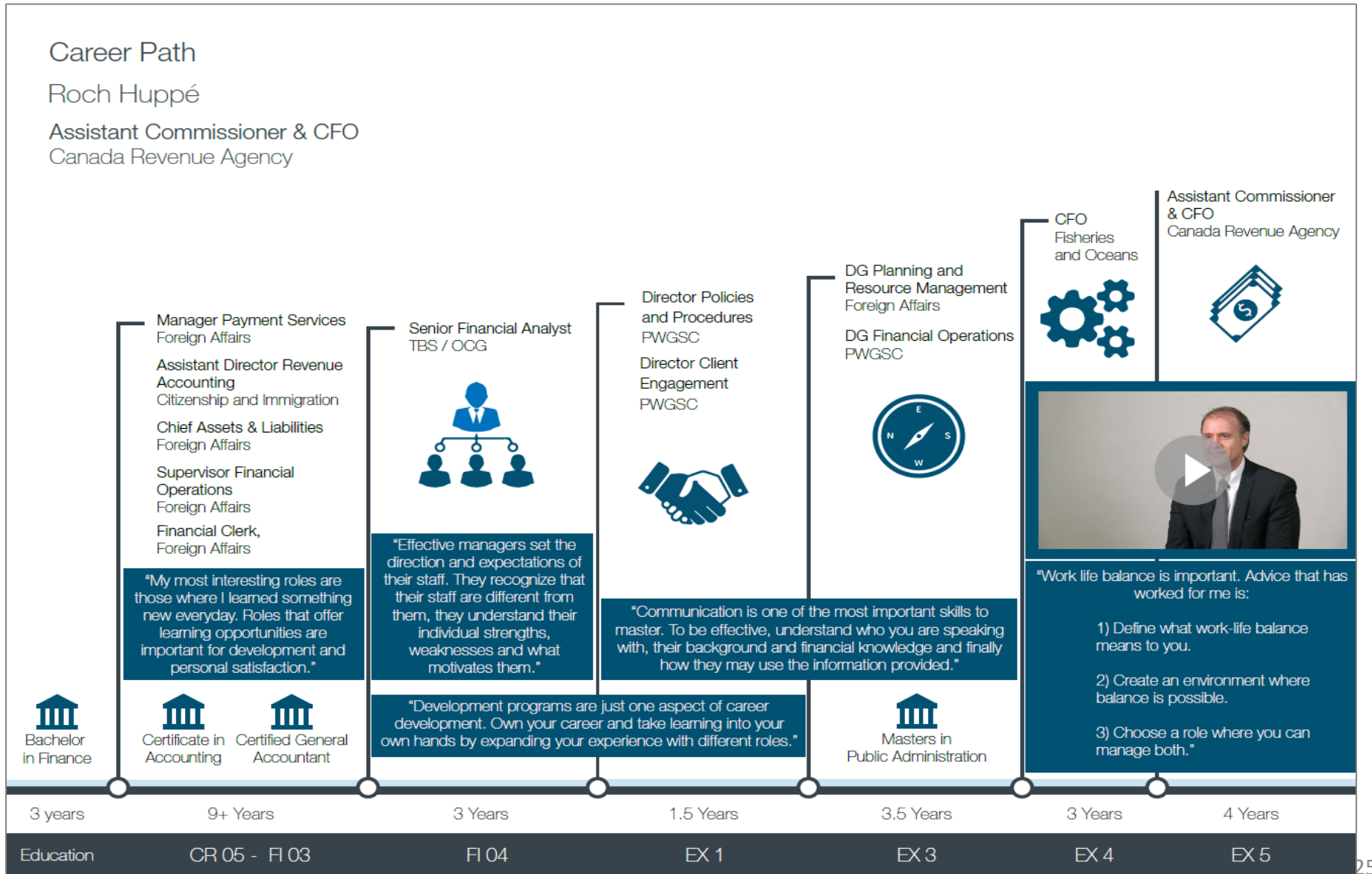


# Career Path: Roch Huppé, Assistant Commissioner & CFO Canada Revenue Agency

## Career Path

Roch Huppé

Assistant Commissioner & CFO  
Canada Revenue Agency



# Questions



## **Nathalie Meilleur**

Acting Executive Director,  
Financial Policy and Community  
Development

[Nathalie.Meilleur@tbs-sct.gc.ca](mailto:Nathalie.Meilleur@tbs-sct.gc.ca)

(613) 698-2213



## **Alexandre (Sasha) Slechta**

Acting Director,  
Financial Policy and Community  
Development

[Alexandre.Slechta@tbs-sct.gc.ca](mailto:Alexandre.Slechta@tbs-sct.gc.ca)

(613) 698-5681