



CPA ALBERTA ACHIEVEMENT AWARDS

Sample Support Documentation— Fellow of the Chartered Professional Accountants

Supporting letters

Thank you for taking the time to submit a nomination for a deserving candidate for the CPA Alberta Achievement Awards.

The samples provided will help you understand what details are required in the supporting documentation for a thorough package, a vital component of a successful nomination. The quantity of letters is unimportant, rather quality endorsement letters should be considered and submitted with the nomination file.

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

Other 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.

Please read the samples that follow at your convenience. If you then have any further questions, please contact awards@cpaalberta.ca.

Letter of Support—Fellowship Nominee

Re: Nomination of Fred Rossford CPA, to Fellow of the Chartered Professional Accountants

Dear Committee Members,

The Canada North Foundation would endorse the nomination, without reservation or qualification, of Fred Rossford CPA, as a Fellow of the Chartered Professional Accountants for contributions to the community.

Fred served the XYZ Foundation (XYZ) for over nine years as a volunteer director, member, and chair of the audit and finance committee since 201X and board chair from 201X to 202X. Fred made an invaluable contribution to the community through dedication and hard work on the board—enabling CNF to contribute to better public policy for Canadians.

XYZ is an independent, non-partisan public policy think tank that focuses on the policies that shape the North, and by extension, Canada. Through evidence-based research and commentary, they provide practical solutions to tough public policy challenges facing the North, and Canada as a whole, at home and on the global stage. XYZ is the only think tank focused on the economic prosperity of the North. We contribute to public discourse and inform policy decisions in the North and nationally. XYZ conducts research and convenes stakeholders to explore problems and identify workable solutions in the areas of responsible resource development, trade, trade infrastructure, and human capital.

As a small not-for-profit organization (annual expenses \$2.5 million), the board provides governance, guidance, and mentorship. With three CEOs in Fred's nine-year tenure, the board played an outsized role in not only hiring new CEOs, but also supporting the organization through the transitions. In particular, the audit and finance committee play much more than an oversight role—they provide active guidance to management on everything from bookkeeping practice to board reporting on operations finance, to endowment investment oversight. As a member and chair of the committee, Fred provided valuable mentorship to management to guide them to more workable, transparent, and useful financial reporting.

The foundation is a research organization with few resources dedicated to administration, but its donors and government funders expect a high degree of accountability. XYZ has been able to provide that level of confidence largely because Fred cared enough about the mission of XYZ to ensure it met its financial responsibilities. There was more patience, handholding, and education required of committee members and its chair than might normally be expected.

And of course, Fred contributed to the broader governance of the organization as board chair (while still serving on the audit and finance committee). The foundation undertook a governance review during Fred's leadership—rewriting its bylaws and reforming the size of the board and its committees.

Fred's calm and reasoned thoughts on policy contributed to the success of XYZ in its core mission as well. There were many demands on Fred's time and many organizations that relied upon Fred—XYZ is ever so grateful that Fred found the time for us.

Barry March
President & CEO

Letter of Support—Fellowship Nominee

Re: Nomination of John Smith CPA, to Fellow of the Chartered Professional Accountants

Dear Committee Members,

We are providing this letter in support of the committee's consideration of John Smith CPA, for the designation of Fellow of the Chartered Professional Accountants.

XYZ Alberta (XYZ) is a not-for-profit organization that provides legal representation and support for Albertans facing legal issues. Within its mandate, XYZ is uniquely positioned to provide services that have a positive impact on the lives of Albertans, including some of Alberta's most disadvantaged citizens. Our services also support access to justice and fairness in Alberta's justice system.

John has been a member of the board of directors for six years and served as a member of the audit and finance committee (AFC) for the duration of his tenure. John was appointed chair of the AFC in 201X and has been dedicated to the success of XYZ and our mandate throughout this period, never hesitating to contribute his leadership, knowledge, and expertise as required.

During his tenure, John has proven to be a continuously strong advocate of XYZ Alberta and the clients we serve. John was instrumental in creating the first sustainable funding model for XYZ in Alberta, through John's work on XYZ's governance agreement with the Government of Alberta (GOA) and the ABC Society of Alberta. Prior to the governance agreement, funding was provided without an agreement as to the services that would be provided to the GOA, how much those services would cost, and how much demand would exist. The governance agreement creates stability and sustainability in our operations, as it addresses both the public and stakeholder's expectations with respect to our service offerings being more open and transparent.

Through John's professionalism, leadership, and knowledge of our stakeholders, John partnered with our new CEO to develop a new partnering relationship with the GOA that has continued to serve XYZ and the broader justice system in Alberta. John is also a mentor to fellow CPAs on XYZ's board—his experience and contributions to XYZ and the CPA professionals that he mentors not only leave a sustained impact, but a legacy for our future.

We strongly support the committee's consideration and recognition of John for the designation of Fellow of the Chartered Professional Accountants.

Bryan Coleborn CPA

Chair, Board of Directors
XYZ Alberta