

IIA Canada Virtual Town Hall - Questions and Answers

February 23, 2023

Governance

What is IIA Canada?

IIA Canada is the distinction given to the more than 7,400 IIA members in Canada, its 12 chapters, and IIA Global staff living and working in Canada.

How are Canadian member needs represented?

The Canada Advisory Committee, Chapter Relations Committee, and North American Board representatives work alongside IIA Global staff to deliver Canadian member needs at the regional, national, and international levels. Strategic alignment strengthens the internal audit profession and better serves member needs.

How are Canada Advisory Committee members selected?

Previously, this was managed by the previous Canadian Board; however, it was not consistent with IIA processes and was not an independent and transparent process. To address that risk, under the advice of counsel, updates were made to bring the nomination process for the Canada Advisory Committee in line with other committees of its size and nature to increase transparency and representation of Canadian chapter leaders. Members of the Canada Advisory Committee are selected during the annual nomination process and communicated to all members in October of each year. Canadian members also vote on their Chapter Relations Committee, North American Board, and chapter leadership via the regular committee process.

When IIA Canada restructuring previously took place, proposals and business cases were given to chapters in advance. Why wasn't that done this time?

Over 20 years ago, a group of Canadian chapter volunteers created a proposal and business case for the then Global Board to enhance Canadian member needs by forming an independent entity. This proposal would leave its current chapter structure and create a separate affiliate. This proposal and business case were presented to all chapters in Canada to ensure it was in line with the chapters' feedback and was completed outside of the standard governance practice. The reset of staffing, operations, and governance was more in line with the overall

charter, and compliance with bylaws. Efforts to better align with the strategic reviews are currently underway.

Why didn't the governance review affect the terminology of the North American Board, which is a committee of the Global board?

The IIA Global Board of Directors is working with the IIA Governance team on a comprehensive, top-down review of the existing governance structure and bylaws. All areas will be reviewed, including the naming convention of committees. This review is still in process.

Will IIA Canada ever be an independent institute? If not, why not?

This is not an item currently being considered. Rather, IIA Global, the North American Board of Directors, the Canada Advisory Committee, and the Chapter Relations Committee are all focused on providing IIA members in Canada with the tools, resources, and services they need to grow in their careers, and to advance the internal audit profession in Canada. We move forward and succeed by listening to our members, building stakeholder relationships, and broadening awareness through the academic communities.

The IIA Canada was incorporated under Canadian Law. Has this been dissolved?

No, it has not been dissolved, it remains a subsidiary of The IIA Inc. and continues to exist as a registered not-for-profit in Canada. The entity exists, and has always existed, purely for tax purposes. The entity has no ties to the Canada Advisory Committee and imposes no Canadian legal requirements on the volunteers on the Canadian committee.

What do IIA Global and the Canada Advisory Committee view as the most pressing needs of Canadian members, and how are they addressing them?

- **Advocacy:** We've hired a dedicated Canadian Advocacy Director to work alongside our North American Advocacy team and Canada's 12 local chapters. Jillian Hernandez will work to amplify your advocacy efforts and build on the 25-year foundation created by Canadian volunteers and chapters.
- **Chapter Support:** The new Associate Manager of Chapter Engagement will help address this need.
- **Translation Strategy:** We've started a comprehensive translation strategy to serve francophone members better.

Items currently being translated include the Certification Handbook, training events and more offerings in French, the CIA practice exam, new and existing webpages, the IPPF exposure draft, and the student value proposition. This multi-tiered strategy starts with existing items and will include any new digital and print assets.

Will Canada still have a seat at the Global Council?

Canada will continue to have a seat on Global Assembly, previously called Global Council.

Operational

What presence does IIA have in Canada? For example, are there any employees based in Canada?

The IIA presence in Canada remains the same and continues to grow. We're investing in expanding member services with new staff and resources. The IIA Canada team has grown to five staff members and includes:

Jeff McIlravey, CRMA, CFSA

- Director, Member Service Delivery, Canada

Jillian Fernandez, MPS, PMP, C.Mgr.

- Director of Advocacy in Canada

Colleen Macdonell

- Manager, Chapter Engagement, Canada

Amanda Delorey

- Manager, Professional Development, Canada

Kostas Kallianteris

- Manager, Marketing & Communications, Canada

Canadian membership continues to have representation at both the national and international volunteer leadership levels. Canadian chapters and members have representation on the Canada Advisory Committee and the Chapter Relations Committee, representing Canadian interests to the North American Board (NAB) and, through NAB, to the Global Board of Directors.

Why doesn't IIA Canada have an Executive Director anymore? What happened to the Executive Director?

Staff restructuring supporting Canadian members and the profession included the change in title from Executive Director to Director, Member Service Delivery in Canada. The title is specific

to the focus of the Director responsible for the Canadian operations. This role has always reported to the Executive Vice President and IIA Global, and this reporting structure remains unchanged.

Will IIA Canada continue to have an Ottawa presence? Or will the mailing address and Canadian office be moved to Toronto?

Discussions are currently underway on the future home of The IIA in Canada. With many of our employees working remotely, we are considering various options to generate savings with a smaller or virtual office.

Does IIA North America have any initiatives to improve its back office capabilities, which, in my 25 years as a member, has consistently lagged behind other professions (e.g. ISACA)?

Yes, the back-office capabilities will grow and improve as we make the necessary changes based on the Digital Transformation projects.

The IIA previously was reliant on older systems, which negatively impacted back-office operations. The new technology platform recently introduced is intended to address and improve back-office operations. Any suggestions for improvement would be greatly appreciated. Contact us at iiacanada@theiia.org.

What does “professionalism” mean to the IIA? What specific efforts is the IIA taking to ensure that the profession and members are seen and heard by others as professionals?

As noted in the IIA Standards and Ethics, professionalism is a cornerstone of what we do as internal auditors. We will continue improving our advocacy efforts and relationships with other associations, stakeholder groups, and academia. We are also encouraged that the evolution of our Global Internal Audit Standards will increase the organizational value of our partners and stakeholders.

Payments & Dues

Why do Canadian members pay more for membership than the rest of North America?

In 2015, the Canadian Board of Directors, as it was known at the time, requested the approval of a \$25 increase in dues for the regular membership tier in Canada. As other North American membership dues have increased, Canadian dues remained unchanged. In October 2022, the North American Board of Directors approved an increase in dues for most membership types effective March 2023, excluding Canada's regular membership tier. As a result, regular membership dues will now be the same across North America.

Why can't we pay in Canadian dollars? The payment of dues and educational fees in USD is problematic for many members, particularly in the public sector. When will payment in CAD be available?

Last year's Digital Transformation was an immense undertaking, and – as with many projects of this scale – post-launch bugs and inefficiencies presented themselves. Unfortunately, we did not solve the currency issue. We understand the importance of this request and are in the process of identifying alternative and permanent payment solutions. For example, members can now use PayPal to pay in Canadian dollars. We will continue to work on improving the user experience for Canadian members.

To provide transparency and accountability, can we get a milestone date for addressing the payments in Canadian funds? Many groups complete their renewals in the March and April timeline - will it be resolved by then, or will the rates be reduced?

The introduction of PayPal as an alternative payment method for member dues and services is active now. However, we are working on a timeline to address Canadian payments that we will communicate to members through IIA Canada and chapter emails.

Why do we have to pay HST when buying our membership in USD?

The Canada Revenue Service (CRA) requires that HST be charged on services, such as membership dues, even if paid in USD. The HST is charged and remitted to Revenue Canada like any other professional association.

Why do virtual events have similar costs as in-person events?

Both delivery methods have inherent costs built into the pricing. In-person and virtual training costs are similar, and we are happy to discuss organizational discounts for IIA training. Please email gettraining@theiia.org for more information.

Member Services

Where do my membership dollars go?

As a not-for-profit professional association, earnings are re-invested to drive member value, set industry standards, create and improve career opportunities, and advocate with critical stakeholders and industry partners. Here are a few ways we're making this happen:

- **Standards and Guidance:** The International Professional Practices Framework (IPPF) is the conceptual framework that organizes authoritative guidance promulgated by The IIA. As a trustworthy, global, guidance-setting body, The IIA provides internal audit professionals worldwide with authoritative guidance in the IPPF as mandatory and recommended guidance. In 2020, the Standards Board began a comprehensive update of the IPPF and the *International Standards for the Professional Practice of Internal Auditing (Standards)*.

The International Internal Audit Standards Board is pleased to announce that the [draft of the proposed Global Internal Audit Standards™](#) is now available through May 30 for public comment, representing a significant milestone in the [multiyear project](#) to comprehensively review and update The IIA's IPPF, including the *Standards*.

- **Advocacy:** The IIA's strategic plan aims to raise the national and global profile and demand for internal audit and ensure critical stakeholders recognize the profession as an indispensable resource. To achieve this in Canada, we have recently invested in and hired a Canadian Director of Advocacy, Jillian Hernandez.
- **Chapter Support:** The IIA in Canada team continues to grow and to focus on needs of Canadian members. The team will now include a new Associate Manager of Chapter Engagement to better serve and meet the evolving needs of Canadian members and chapters. In addition, resources are being added with a focus on the Canadian translation strategy.

- **Flexible and Discounted Learning Opportunities:** The IIA has created a portfolio of customized and industry-leading resources to help prepare internal audit professionals and executives to meet the ever-evolving needs of their role, staff, and stakeholders.
- **Certifications:** IIA certifications help practitioners establish professional credibility, increase earning potential, boost organizational efficiency, and achieve a competitive advantage in the job market. IIA certifications are globally recognized and trusted – we set the standard in certification development, testing, and administration.
- **Networking Opportunities:** On an international level, these include the International Conference, Leadership Academy, and Global Student Conference, where internal audit leaders can network with like-minded professionals and students can learn from their experiences. National events include the National Conference, held this year in Ottawa, Ontario, from October 3-5. On a local level, chapters organize a variety of events and symposiums. Check with your local chapter for upcoming events and networking opportunities.

How can we provide feedback on the new IIA Global Internal Audit Standards™ draft?

The International Internal Audit Standards Board invites you to review the proposed new Standards and to comment via the survey, which you can access from this page: <https://www.theiia.org/en/standards/Standards-Public-Comment/>. The public comment period is open from March 1–May 30, with an official release scheduled for the end of 2023. The timeframe for other languages depends upon the availability of the translations and may vary slightly. The French translation will be available soon.

How is IIA Global meeting the needs of francophone members?

We are expanding our team and hiring additional bilingual staff. We have also started a comprehensive translation strategy for digital and print resources, French CPE offerings, and improved member communication for francophone members.

When will the CIA Challenge Exam be available?

Members can register for the CIA Challenge Exam (CPA or CISA) in April or September 2023. To learn more, visit <https://www.theiia.org/en/promotions/certifications/qab/qab-cia-challenge-exam/>.

Can we have IIA training seminars in Florida during winter and not summer?

An excellent suggestion that we're discussing with the IIA Member Competency and Learning Team.

Can I submit a speaker abstract for this year's IIA Canada National Conference in Ottawa? Is it too late?

The Call for Speakers closed on February 12, 2023. However, we always seek to work with our members in providing speaking opportunities on panels, webinars, and in-person events. Contact us at iiacanada@theiia.org to learn more.

We no longer receive a printed version of the IIA magazine "The Internal Auditor," only a digital version. In our day jobs, we spend much of our time in front of screens, and some members still prefer the printed version. Will this decision be revisited?

We have received similar feedback from many of our members. Our team is working on options for offering an optional printed version in 2024.

Advocacy and Partnerships

How will IIA Canada move forward on public policy and Advocacy?

The IIA's strategic plan promises to raise the national and global profile and demand for internal audit, ensuring critical stakeholders recognize the profession as an indispensable resource. To achieve this in Canada, we have recently invested in advocacy efforts by welcoming a new Canadian Director of Advocacy to the team, Jillian Hernandez. Jillian will work and engage with Canadian members to build on over 25 years of advocacy work completed by our chapters in Canada and develop a new Canadian public policy and corporate governance engagement program.

What can IIA Canada do to enhance the IIA's Internal Audit Educational Program (which currently only has the University of Waterloo as a participant)?

We are currently working with our existing post-secondary leaders to promote and engage the Internal Auditing Education Partnership program with other institutions in Canada. We plan to work with our chapters and members to further this program as we continue outreach to students and academics throughout Canada.

Are we taking advantage of any innovation grants/incentives in Canada for some of our advancements with the IIA to serve the members better?

There is a renewed focus and alignment with the new Canadian Directors of Member Service Delivery and Advocacy to evaluate any opportunities that can benefit Canadian members. These could include research, white paper, or program development. There are many great opportunities for the profession to innovate for the benefit of members.

Can you elaborate on the efforts made with industry stakeholders to boost internal audit and create more job opportunities in the field?

From an advocacy standpoint, we are working to engage members to understand better the profession's public policy priorities and how we can work to enhance the profession in public policy discussions with stakeholders. We'll develop plans based on these insights and continue collaborating with members to identify ways to improve the profession's influence.

Can we collaborate with ISACA to deal with Cyber Security and Data Integrity audits instead of leaving these opportunities to other organizations?

There are many opportunities at the national, chapter, and global levels, especially with joint conferences held with ISACA and symposiums at the academic level. Improved collaboration with other associations and stakeholders is top of mind and vital in program development for members.

Chapters & Volunteering

Why did the Chapter websites change?

Chapter websites were updated to ensure consistency across branding. This integrated format allows for better collaboration and access to information. For example, you can now browse and find neighbouring chapters and representatives and use it as a directory and collaborating tool. While we recognize this was a significant change, we also know that improvements can still be made. We continuously look to improve the website and ensure volunteers and members have the support and tools they need. Our Chapter Engagement team is here to assist and answer any questions, so don't hesitate to reach out for help: ChapterRelations@theiia.org.

Can complimentary Chapter webinars be offered to members in other regions, helping to earn additional CPE hours?

Yes, at the discretion of each chapter. We encourage chapters to coordinate with each other. The new Associate Manager of Chapter Relations in Canada will help to coordinate efforts and facilitate cross-promotions.

Suppose the member survey indicated that members are happy with IIA Global services. Is there currently a discussion (or even a planned discussion) on whether there should be local chapters anymore? Or a change to the current chapter structure?

Chapters play a vital role in the local delivery of member services, which is the focus of a new Chapter Task Force that includes Canadian members. Current strategic discussions have not included any conversation related to eliminating all chapters. Rather, those conversations are focused on providing chapters greater support and reducing their administrative burden so our volunteers can better serve members and focus on issues like member recruitment, student engagement, advocacy, and promotion of the CIA.

Are there any professional volunteer opportunities available to Canadian members? Where do I start?

There are many opportunities to volunteer with The IIA and bolster your professional resume! You can volunteer at your local chapter or with IIA Global – serving as an officer or leader, volunteering at events, or helping to run local social media, as just a few examples. Volunteers are at the heart of The IIA's success. With your help, we can identify trends, programs, and services to ensure we continue guiding the profession into the future.

Are you interested in volunteering? Contact us at iacanada@theiia.org to learn more.