

June 2018

Criteria and Documentation
for
TITLE OF FELLOW (FCPA)
Conferred by CPA Manitoba

Nomination File

2018-2019



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Preamble

The Canadian accounting profession will, on a jurisdictional basis, formally recognize those members who have rendered exceptional services to the profession or whose achievements in their careers or in the community have earned them distinction and brought honour to the profession by the awarding of the title Fellow CPA (FCPA). The service and accomplishments of the individual throughout his/her career – not simply his/her career as a CPA – will be taken into account in determining eligibility.

The purpose of this guide is to assist persons wishing to nominate a member of CPA Manitoba for the title of Fellow (FCPA). It outlines in detail each phase of the process and will serve as an essential reference.

The first step is to review the election criteria, specifically the sections entitled “Eligibility of Candidates,” “Nature of Achievements Under Review” and “Submission of the Nomination File.”

The second step is to complete the nomination file by following the instructions for each section.

Submission of the Nomination File Deadline November 30, 2018

Nominators are responsible for ensuring that the file is complete and that the information it contains is accurate and sufficient to allow the Member Recognition Program Committee to evaluate fairly the nomination submitted. The decision of the Member Recognition Program Committee and the Board of Directors will primarily depend on the care taken to describe the member’s achievements. You should therefore **clearly indicate** the businesses, organizations and committees in which the member has been involved, his or her publications and accomplishments, as well as the **relevant dates**. Where additional space is required, please attach a separate sheet.

While the nomination file must be complete in itself, you should be aware that the Member Recognition Program Committee reserves the right to have the main facts in support of a nomination validated by an outside source.



Election criteria

Eligibility of candidates

The appended FCPA title awarding and withdrawal policy lists the cases in which members are not eligible to become FCPAs and provides specific guidance for situations in which members have been the subject of a reprimand or fine. Before embarking on the process of preparing a nomination file, and given the highly confidential nature of the information involved, you should first find out from the candidate whether he or she is eligible for the FCPA title.

Nature of achievements under review

This section of the policy is the core element of the FCPA title nomination file.

First, you will note that nominators must highlight the candidate's **leadership** and the **exceptional nature** of the candidate's performance in the following fields of activity:

- professional career;
- **volunteer involvement** in the affairs of the accounting profession;
- **volunteer contribution** to professional, community or charitable organizations.

Candidates need not have made an exceptional contribution or demonstrated leadership in each of these three areas. You must choose one of the following options:

Option 1: *Demonstrate that the candidate has made a remarkable contribution in more than one field of activity.*

Nominators must demonstrate that the remarkable contribution of the candidate is common knowledge, i.e., that the acknowledged achievements make the member a recognized leader due to the quality of his or her significant contribution in more than one of the three fields of activity listed above.

Option 2: *Demonstrate that the candidate has made an outstanding contribution in at least one field of activity.*

Nominators must demonstrate that the **outstanding contribution** of the candidate is **common knowledge**, i.e., that the acknowledged achievements make the member a recognized and prominent leader in the field(s) of activity selected.

Except in extraordinary circumstances, the candidate must have made an exceptional contribution or demonstrated leadership in more than one field of activity.

In addition, nomination files must highlight the fact that **candidates clearly identify themselves as Chartered Professional Accountants and that they are known and recognized as CPAs.**

The service and accomplishments of the individual throughout his/her career - not simply his/her career as a CPA - will be taken into account in determining eligibility.



TITLE OF FELLOW (FCPA) OF CPA MANITOBA

Nomination File

Deadline November 30, 2018



Nomination file for the title of Fellow (FCPA)

As mentioned previously, nominators are responsible for ensuring that the file is complete and that the information it contains is accurate and sufficient to allow the Member Recognition Program Committee to evaluate fairly the nomination submitted.

A person nominating a candidate must be a member of CPA Manitoba (FCPA or CPA). The name of this person is communicated to the Member Recognition Program Committee and **he/she is required to provide a letter explaining why the candidate has been nominated.** Should the members of the Member Recognition Program Committee wish to validate information contained in the file, the nominator may be contacted.

Please complete the nomination file by following the specific instructions for each section and filling in the information directly on the document.

I, the undersigned, member of CPA Manitoba, nominate the following member of CPA Manitoba for the title of Fellow of CPA Manitoba:

Name of Candidate

Telephone

Email Address

This member has earned exceptional distinction in his or her professional career and in the community by acknowledged achievements that bring honour to the profession. For each of the eligibility criteria for the title of Fellow, I have outlined on an attached document the most outstanding achievements of the member being nominated and I have attached all relevant supporting documents.

City: _____ Date: _____

I hereby officially declare having ascertained that the information contained in the attached file is accurate and sufficient to allow the Member Recognition Program Committee to evaluate fairly the nomination file. I am aware that the Member Recognition Program Committee may have the main facts in support of this nomination validated by an outside source.

Nominator Information

Name: _____ Telephone: _____

Email: _____ Signature: _____



SECTION 1

Identify the proposed candidate.

Last Name: _____ First Name: _____ Date of Birth: _____

Employer: _____ Position: _____

Address: _____

Year(s) accounting designation(s) was/were obtained: _____

Sector: Industry Education Government Not-for-Profit Public Practice
 Retired Other (*please specify*) _____

SECTION 2

REMARKABLE CONTRIBUTION

Nominators must demonstrate that the candidate's **acknowledged achievements** make him or her a **recognized leader** due to the quality of his or her significant contribution **to more than one of the three fields of activity listed**.

If you select this option, complete at least two sections **from among sections 3, 4 and 5**.

OUTSTANDING CONTRIBUTION

In exceptional circumstances, candidates will be considered for fellowship for making an outstanding contribution to just one of the fields of activity. Nominators must demonstrate that the candidate's **acknowledged achievements** make him or her a **recognized and prominent leader** in the field(s) of activity selected.

If you select this option, **complete only one of sections 3, 4 or 5**, but do so in sufficient detail to demonstrate clearly that the candidate has made an OUTSTANDING contribution.

SECTIONS 3 TO 5

1. Begin by providing a factual description of the environment in which the candidate worked throughout his or her full career as a professional accountant (not simply as a CPA).
2. **For each item you mention**, you must highlight the candidate's **leadership** and the **outstanding nature** of the candidate's performance. You must demonstrate that the candidate's **outstanding contribution** is **common knowledge**, i.e., that the acknowledged achievements make the member a recognized and prominent leader in that particular field of activity, or that the candidate's **remarkable contribution** is common knowledge, i.e., that the acknowledged achievements make the member a recognized leader due to the quality of his or her significant contribution in more than one of the fields of activity listed.



SECTION 3

PROFESSIONAL CAREER (LEGACY BODY AND CPA)

Identify main stages of professional career

Under this heading, describe the candidate's career path, beginning with the current position or, if the candidate is retired, the last position held.

Employer	Position	Dates (<i>Years from/to</i>)
1.		
2.		
3.		
4.		

Identify major achievements in professional career

Under this heading, describe the achievements showing that the candidate has made an outstanding or remarkable contribution, and **highlight the way these achievements earned the candidate distinction.**

1.
2.
3.
4.
Other:



SECTION 4

VOLUNTEER INVOLVEMENT IN THE AFFAIRS OF THE ACCOUNTING PROFESSION

Under this heading, list the main committees or task forces of which the candidate has been a member, the events or activities in which he or she took part, and in what capacity (member, chair, organizer, speaker, etc.).

Committees / Task Forces / Activities / Events	Organization	Position	Dates (Years from/to)
1.			
2.			
3.			
4.			

Identify major achievements during involvement in the affairs of the profession

Under this heading, describe the achievements showing that the candidate has made an exceptional or remarkable contribution, and **highlight the way these achievements earned the candidate distinction.**

Major Achievements: <i>(Please match the numbers to those above.)</i>
1.
2.
3.
4.
Other:



SECTION 5

VOLUNTEER CONTRIBUTION TO PROFESSIONAL BODIES OR TO COMMUNITY/CHARITABLE ORGANIZATIONS

Under this heading, list the candidate's **most important** volunteer activities with civic, community, socioeconomic, professional or charitable organizations, beginning with the most recent.

Organization	Position	Dates (Years from/to)
1.		
2.		
3.		
4.		

Identify achievements during involvement with these organizations

Under this heading, describe the achievements showing that the candidate has made an exceptional or remarkable contribution, and **highlight the way these achievements earned the candidate distinction.**

Major Achievements: <i>(Please match the numbers to those above.)</i>
1.
2.
3.
4.
Other:



SECTION 6

This section should identify the source of the letters of support attesting to the candidate's achievements. Please enclose the letters with the nomination file. The number of letters is not important; the quality of the endorsement is the significant thing. 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.

LETTERS OF SUPPORT (ENCLOSED OR TO BE SUBMITTED)

Under this heading, please list the letters of support and identify their source.

Total number of letters of support: _____

Name	Position	Employer
1.		
2.		
3.		
4.		
Other:		



SECTION 7

ATTESTATION OF IDENTIFICATION AS A CPA

Highlight clearly the fact that the candidate identifies himself or herself as a CPA and is recognized as such. Supporting documentation may be enclosed.

Attestation of Identification as a CPA
Can you confirm that the candidate makes it known that he or she belongs to the CPA profession? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>(Please explain briefly)</i>
List of enclosed supporting documents:
Candidate's business card: <input type="checkbox"/> Yes <input type="checkbox"/> No
Press clippings: <i>(Please specify)</i>
Annual Report: <i>(Please specify)</i>
Other: <i>(Please specify)</i>



SECTION 8

AWARDS, TITLES OR HONORARY DISTINCTIONS

List all the awards, titles or honorary distinctions the candidate has received throughout his or her career, beginning with the most recent:

Award	Organization	Year	Comments
Others:			



SECTION 9

CHECKLIST TO BE COMPLETED BEFORE SENDING NOMINATION FILE TO CPA MANITOBA - DEADLINE NOVEMBER 30, 2018

To ensure that you have followed all the steps and included the appropriate documents in the

Checklist	
First step:	
<input type="checkbox"/>	To the best of my knowledge, the candidate is eligible for the FCPA title. Enclosed is my letter explaining why the candidate has been nominated.
Documents to be forwarded to CPA Manitoba	
<input type="checkbox"/>	Duly completed FCPA title nomination file. <i>(Please refer to Section 10 - Transmission Method)</i>
<input type="checkbox"/>	I identified the option selected for purposes of evaluating the nomination (Section 2).
<input type="checkbox"/>	The file adequately highlights the candidate's leadership and the outstanding nature of the candidate's performance.
<input type="checkbox"/>	The file adequately highlights the fact that the candidate's achievements are common knowledge.
<input type="checkbox"/>	The file unequivocally demonstrates the remarkable or outstanding nature of the candidate's achievements.
<input type="checkbox"/>	The file includes letters of support that are either enclosed or will be sent to CPA Manitoba in confidence.
<input type="checkbox"/>	The file highlights the fact that the candidate clearly identifies himself or herself as a CPA and is known and recognized as such, and all supporting documents are enclosed.

SECTION 10 TRANSMISSION METHOD

Ensure that you have carefully completed the checklist in Section 9. You are required to submit an electronic copy of the nomination file. Please make sure that the letters of support and other supporting documentation are enclosed with the electronic copy of the nomination file.

Please send the completed nomination file to:

Sarah Lipinski
 Coordinator, Member Services
 CPA Manitoba
 Email: slipinski@cpamb.ca



APPENDIX

THE TITLE OF FELLOW (FCPA) AWARDING AND WITHDRAWAL POLICY

The title of Fellow is intended to formally recognize Canadian and Bermudian CPAs who have rendered exceptional services to the profession or whose achievements in their careers or in the community have earned them distinction and brought honour to the profession. The service and accomplishments of the individual throughout his/her career – not simply his/her career as a CPA – will be taken into account in determining eligibility.

The Canadian jurisdictions have agreed to the following criteria to ensure the openness of the eligibility process and to ensure that the Fellowship may be used in any jurisdiction and not simply in the jurisdiction in which it was conferred.

Eligibility of candidates

General principle

All members of CPA Manitoba, including those working outside the jurisdiction and those employed by CPA Manitoba, are eligible for a Fellowship.

Exceptions

The following persons are not eligible to become FCPAs:

- members who have been the subject of a disciplinary decision resulting in termination of membership of a professional body or a similar organization;
- members whose right to engage in professional activities has been suspended or cancelled by CPA Manitoba;
- members who are currently subject to a limitation or suspension of their right to engage in professional activities;
- members who are the subject of a jurisdictional inquiry or who are being prosecuted before the civil or criminal courts.

Notwithstanding the general principle and the exceptions set out above, CPA Manitoba may accept a nomination after taking the relative weight of the offence into account. To do so, CPA Manitoba must consider in particular:

- the seriousness of the offence and the penalty imposed;
- the length of time between the date the penalty was imposed and the submission of the nomination;
- the media coverage of the case.