



The Institute of
Internal Auditors

IIA Edmonton Chapter

Strategic Plan 2024 to 2025

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Executive Summary

- The Edmonton Chapter is managed and operated by a group of volunteer internal auditors who are dedicated to providing continuing professional development, networking and advocacy opportunities for members within Edmonton.
- The Chapter currently has more than 300 members and organizes various courses, luncheons and social events that take place throughout the year. The Chapter is an IIA Platinum Award winner for overall excellence.
- The Chapter has several opportunities to partner with other membership-based organizations in Edmonton, such as the Association of Certified Fraud Examiners and the Information Systems Audit and Control Association (ISACA) to host luncheons and conferences for its members.

Our Team

Position	Name
President	Rachelle Paquette
Vice President - Membership & Certifications	Lori Sunde-Cooper
Vice President - Programs	Nikki Sandie
Treasurer	Andy Chen
Secretary	Zahir Kachwalla
Director - Audit Committee Chair	Jenn Freitas
Director - Academic Relations Committee Chair	Sophia Kasozi
Director - Academic Relations Support	Queenena Dong
Director - CAE Support	Zahir Kachwalla
Director - Communications	John Mikhail
Director - Communications – Website	Duminda Chandraratne
Director - Communications Support	Ed Fong
Director - CAP Reporting	Janine Mryglod
Director - Program Support	Elvin Smith
Director - Program Support	Carlla Goosen
Past President	Janine Mryglod
*Shivana Mahabir - On maternity leave.	

Our Plan 2024 to 2025 – CAP Requirements

- The basic CAP requirements generally remain consistent with the previous year.
- Track CAP requirements on a monthly basis, ensuring that we obtain all necessary points to continue with our status.
- Liaise with each portfolio on a monthly basis, through monthly Board meetings, to ensure that we can meet our goals.
- Advocacy Challenge – Outreach to legislators, other professional groups etc.

Our Plan 2024 to 2025 – Programming

- 8 virtual luncheons
- 2 in-person events, (December CAE/luncheon, May AGM – TBD)
- Fraud conference (joint event with ACFE, 16 CPE, March 4 & 5, 2025)
- Introduce polling questions during virtual meetings in addition to survey to keep a better pulse on programming needs and fulfill CAP requirements
- Explore **data analytics** to better understand programming needs
- Explore joint virtual events with other chapters (e.g. Standards changes)
- Explore joint event with ISACA (CAP points)
- In-depth offerings (ESG, AI, etc.) – more “how” than “what”

Our Plan 2024 to 2025 – Membership and Certifications

- Coordinate with Programming to provide CPE opportunities to members
- Coordinate with Academic Relations/ Advocacy to increase student memberships
- Coordinate with CAE Support to promote membership and certifications
- Send email to non-active members to encourage maintenance of membership
- Send email to non-certified members to promote certification
- Send email certified members to promote additional certifications
- Coordinate with Programming to recognize anniversaries and certifications
- Coordinate with Communications to communicate CPE changes

Our Plan 2024 to 2025 – Academic Relations

Program Goal	Strategies	Action Plans	2024/2025 Timelines
Increase the awareness of IIA by promoting the profession to students and existing professionals	1. Continue IIA Edmonton Chapter's presence in post-secondary career fairs	• Inquire and attend career fairs at the University of Alberta, MacEwan University and NAIT Polytechnical.	Fall/Winter
		• Attend a professional Career Fair.	
	2. Collaborate with instructors to include internal audit in their courses and educational materials	• Connect with instructors and encourage the inclusion of IIA and internal audit in their lectures.	Summer/Fall
		• Collaborate with instructors to do short presentations on internal audit.	
	3. Increase the number of IIA scholarship applicants	• Develop and action a communication plan to communicate IIA's scholarship on social-media platforms.	Fall/Winter
		• Hand out scholarship applications at post-secondary presentations and career fairs.	
	4. Create partnerships with other organizations such as ISASCA and CPA Alberta.	• Contact 1-2 organizations to create a joint event for students/professionals.	Fall/Winter/Spring
	5. Attend IIA National Academic Relations calls and implement initiatives that attract students and professionals to the IIA.	• Participate in IIA National Academic Relations calls.	Fall/Winter/Spring
		• Implement 1-2 ideas from IIA National Academic Relations.	

Our Plan 2024 to 2025 – Chief Audit Executive Support

- At least two CAE Roundtables
- A potential social/cocktail hour
- Presentation/demo on a particular tool/platform

Our Plan 2024 to 2025 – Communications

- Refine communications channels
 - Include more content in website (e.g. webinar decks)
 - Additional channels?
- Continue active advertising of IIA global and national events (via email/LinkedIn)
- Ask membership on their communication preferences
- Create and distribute board email addresses

Our Plan 2024 to 2025 – Treasury

- 2024/25 Annual Report of Revenue and Expenses Review for submission to IIA – Submit by Aug 31, 2024 – Completed
- 2024/25 Budget and Giving Pledge Form – Submit by Sept 30, 2024 – Completed

Our Budget 2024-2025

Chapter Budget Form - Amounts are in Canadian dollars			
Revenue			
	2024 - 2025 Budget (Current year)	2023 - 2024 Actual (Last year)	Difference
Meetings / Seminar Revenue	\$4,500.00	\$4,325.00	\$175.00
Conference Revenue	\$16,000.00	\$14,720.25	\$1,279.75
Sponsorship/Advertising Revenue	\$500.00	\$500.00	\$0.00
Interest/Dividend Revenue	\$2,000.00	\$2,731.53	-\$731.53
Allotment from IIA HQ	\$3,800.00	\$3,807.78	-\$7.78
Miscellaneous Revenue (Describe)	\$0.00	\$0.00	\$0.00
Total Revenue	\$26,800.00	\$26,084.56	\$715.44
Expenses			
	2024 - 2025 Budget	2023 - 2024 Actual	Difference
Meetings / Seminar Expense	\$15,000.00	\$16,342.26	-\$1,342.26
Conference Expense	\$4,000.00	\$2,749.22	\$1,250.78
Chapter Administration and Board Expenses	\$1,500.00	\$2,070.89	-\$570.89
Postage, Stationary, Advertising and Communication Expenses			\$0.00
Credit card processing fees (Paypal, bank, etc.)	\$265.00	\$243.59	\$21.41
Website expense			\$0.00
Software License and Fees	\$360.00	\$360.00	\$0.00
Event Management Fees			\$0.00
Travel Expense (i.e. District Workshop)			\$0.00
Leadership Academy (Annual Training event in Orlando, FL)	\$8,500.00	\$8,326.33	\$173.67
District Representative and District Advisor Support	\$1,000.00		\$1,000.00
Awards, Plaques, etc.			\$0.00
Scholarship Award Fees	\$2,000.00	\$4,000.00	-\$2,000.00
Honorariums			\$0.00
President Expenses			\$0.00
Committee Expenses (Audit Committee)	\$1,500.00	\$1,400.00	\$100.00
Committee Expenses (Social Committee)			\$0.00
Committee Expenses (Membership)			\$0.00
Committee Expenses (Communications)			\$0.00
Donation to Internal Audit Foundation	\$400.00		\$400.00
Donate to other IIA Initiatives	\$600.00		\$600.00
Support for other IIA Chapters		\$700.00	-\$700.00
Insurance			\$0.00
Depreciation Expense			\$0.00
Bad Debt Expense			\$0.00
Miscellaneous (LAC Round Table \$1000, Academic Relations \$2500)	\$4,500.00	\$1,625.00	\$2,875.00
foreign exchange		-\$94.89	\$94.89
Total Expenses:	\$39,625.00	\$37,722.40	\$1,902.60
Net Surplus (Deficit)	-\$12,825.00	-\$11,637.84	-\$1,187.16
<i>Exchange rate (from Canadian of US dollars)-2023 annual</i>	<i>1.3497</i>	<i>1.3497</i>	<i>1.3497</i>
<i>Net Surplus (Deficit)-USD</i>	<i>-\$9,502.11</i>	<i>-\$8,622.54</i>	<i>-\$879.57</i>

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