

Indigenous Event – Meeting Summary

Meeting Purpose

The meeting was held on December 16, 2020 was hosted and chaired by Jan Sampson and these notes were compiled by CPABC.

In discussions with provincial government ministries, post-secondary institutions, Indigenous organizations, and many others, CPABC has heard that Indigenous individuals may not see the value and opportunities that come from an education in business and finance, and that raising awareness and excitement regarding this education pathway amongst Indigenous students, youth, and communities would be beneficial.

CPABC, AFOA BC, and others have discussed collaborating on an Indigenous event or gathering to create greater awareness of business education and career opportunities for Indigenous students, career changers, or those that are unemployed, in order to demonstrate the value of finance and business towards Indigenous community building.

This was an opportunity to brainstorm how we might host a collaborative event that connects Indigenous students and community members who are interested in business with Indigenous advisors, faculty liaisons, business leaders, employers, and other relevant organizations. We explored questions such as:

- Who should attend this event?
- How do we reach them?
- What kind of event should it be?
- How do we create excitement?

Meeting attendees

Indigenous Community Members

Sandi Hendry
Elder, Two Rivers Métis Society
Elder, Thompson Rivers University

Chartered Professional Accountants of BC

Lorena Christensen, CPA, CMA
Director, Student Recruitment and Employer Relations

Sharon Hummel
Manager, Student Recruitment

Danielle Levine, BA, MBA
Director, Interdepartmental New Initiatives

Stephanie Roy
Manager, Employer Relations

Jan Sampson, FCPA, FCA
Executive Vice President, Member and Student Experience

Vivian Tse, MPA
Manager, Communications

Jade Tsui
Project Assistant, Indigenous Strategy

Kerri Wilcox
Vice President, External Affairs and Communications

Aboriginal Financial Officers BC

Wendy Ham, CPA, CGA, CAFM
Executive Director

Métis Nation BC

Jason Chan
Senior Director, Ministry of Employment and Skills Training and Post-Secondary Education

First Nations Financial Management Board

Geordie Hungerford, CFA, CAIA, MBA, LLB
CEO

Patricia Sayer
Manager, Standards and Certification

Jennifer Tetrault
Senior Human Resources Manager

Scott Munro, CPA, CA, CAFM
Director, Standards & Certification

Justin Jimmy
Manager, Capacity Development

Accounting Firms

Jeremy Favel
HR Associate
D&H Group

Jeromy Spence, CPA
Senior Manager, Indigenous Services
MNP

Kenny Ansems, CPA, CA, CAFM
Provincial Director of Indigenous Services
MNP

Jesse Radu, CPA, CA
Partner, Assurance
PwC

Academia

Jewell Gillies
Student Services, Student, Graduate & Co-op Employment Services Indigenous Student Initiatives
Okanagan College

Jennifer Hooper
Director
UBC Sauder Ch'nook Scholars Program

Shannon Thompson, CPA, CMA
Manager, Business Development
UBC Sauder School of Business

Peter Tingling, PhD, MBA, CPA, CGA
Associate Dean, Undergraduate Programs
SFU Beedie School of Business

Tammy Towill, FCPA, FCMA
Chair, School of Business
Capilano University

Regrets

Dennis Silvestrone
Dean, Business and Professional Studies
Capilano University

Melanie Assiniwe, CPA, CA
Director, Capacity Development and Intervention
First Nations Financial Management Board

Katie Trace
Senior Director
Ministry of Youth, Ministry of Digital Government, and Ministry of Women & Gender Equity
Métis Nation BC

Mikaela Bocking
CPA Campus Talent Acquisition Specialist
PwC

Introductions

Attendees were asked why they felt it was important for themselves, and their organization to participate in this event. Some of the key themes that were discussed included having a passion for education and specifically, the need to inform and connect Indigenous students and communities with business education.

There was a general acknowledgement that Indigenous students often do not consider business, and that Indigenous community members don't always understand the pathways to financial acumen and how this benefits communities. Ensuring these audiences received information about the opportunities in finance and accounting was critical to build capacity in communities, address barriers to entry, and showcase pathways to the CPA profession through profiling success stories.

This event could highlight these career options and help make them more accessible to a wider population, including Indigenous women and youth. Creating awareness, excitement, and engagement about these careers would be worthwhile and will be valuable for individuals as well as Indigenous communities.

Discussion Summary

Each breakout room included representation from the different organizations in attendance. Discussion was focused around the key themes identified in the meeting purpose, and key questions were raised during the discussion that will need to be addressed as part of the planning process.

Discussion Themes

- Accessibility (highlighting success as well as barriers)
- Bridging programs
- Building wealth and financial health
- Capacity building
- Increasing Indigenous participation in business programs and accounting
- Spark interest and build confidence through storytelling
- Co-op/internships (test out a profession)

Event Focus: How broad do we go?

It was suggested that the event could start with a regional pilot and things could then be replicated for other regions, which could be a more manageable scope to start with.

The event should not just focus on accountants. We should consider what information attendees need in order to achieve their goals in business. The event should be inclusive of anyone interested in business, with the CPA pathway being highlighted as one possible career option, but attendees should be able to see themselves in a variety of roles.

However, we need to keep in mind that we can't focus on everything, there should be some prioritization of focus for the initial event.

Potential Event Participants

It will be critical to clarify who we are trying to target (e.g., urban/rural/mature students), and to work with community partners and Indigenous governments. Indigenous governments have a need for people in the public sector, particularly CPAs, but there is little exposure of CPAs' role in the public sector. One way to look at this is what are the stories we want to share and who are the people best positioned to tell them/share them.

From an education perspective the education and training coordinators and economic development officers can connect the event with the right individuals or will have the right contacts for getting the word out. For example, UBC's Ch'nook Program has over 200 alumni, who are probably mentors in their own communities and involved in some economic development. This could be an important group to include and the alumni could be profiled.

Attendance should be open to whoever is interested as many Indigenous students are either currently enrolled or are mature students considering their options. Important to note that students and mature career changers would have different barriers to education and those barriers should all be addressed as part of the event. Realistically, there could be two different events, one for younger students and one for those who are more mature. If not, a singular event should ensure that the different needs of these audiences are addressed.

In terms of participation, many rural communities will not have access to stable internet and the technology needed to be a part of the conference.

Key Questions:

- How do we engage respectfully in the communities and conduct meaningful consultation?
- Is there a grassroots way to find advocates for the event in some of the larger and more progressive nations and organizations?
- How do we build on the deep connection between government, elected council, and community members?

Needs of an Indigenous Audience

Careers in finance and accounting need to be made relatable to the community, highlighting that more Indigenous representation is needed. Tribal councils may host career fairs for Indigenous students, but there is not much finance or accounting representation there. Accounting is not viewed as an attractive profession, even though it is important for band governance, economic development, etc.

We need to highlight how a career in business, accounting, and finance can make a difference for Indigenous communities, similar to how a career in law is viewed.

Key Questions:

- How do we come together in a coordinated way to get the message across?
- Can we create or highlight a path for Indigenous students to undertake a career in business, accounting, and finance?

Creating Engagement, Value, and Excitement

There are many exciting aspects to a career in business, accounting, and finance, including leadership skills; the more experience you gain the more trust people place with you. Much of the discussion around building excitement and value for the event was focused on business education and the CPA designation.

Storytelling will be central to the event in order to create excitement about careers in finance and accounting, and will help students and community members see how they can be successful and bring benefits to their community. It can also focus on how such skills and careers supports reconciliation.

For example, capturing the value to Canada and BC of more Indigenous representation in the CPA profession through storytelling:

- Different leadership style, cultural lens, more engagement at the commercial level/private sector.
- Influencing natural resource activity.
- Vision – we need to grow this and here’s the reason – wonderful opportunity to be one of the first in this journey.

The legal profession has attracted many Indigenous people and it may be worthwhile speaking to Indigenous lawyers to understand what drew them to be early trailblazers in the legal field. This may help us understand how to inspire future CPAs.

Many were likely drawn to the legal profession due to decades of social justice issues that were and are affecting Indigenous people – how do you translate that to the finance world?

We need to connect managing financial wealth, not poverty, with changing community in the broader sense. Tell the story of the CPA profession through successful CPA community members to take them through the journey and connect back to the community (e.g. self-funded nations, economic

development). Profile the many ways that CPAs give back and contribute to the community by facilitating stability, growth, and success through a myriad of roles. “Business and the CPA can be a foundational education that takes you and your community anywhere you want to go.”

The story has to be about change, “we are on our way to accomplish the 7 generations of healing and rise above and be real contributors.” We need to drive home that we need CPAs to help drive this change, just like how lawyers were needed to drive social justice. The challenge is that legal issues are easy to pinpoint, but that’s not the case in finance/accounting.

One example of effective storytelling in academia is a Sauder program for Indigenous high school students considering UBC, Future Global Leaders. They bring in community members to speak about their personal experience, how they grow their business/ experience as a CFO/ etc. – so students feel a cultural connection to the material.

Key Questions:

- How and when do you generate interest in business and finance?
- When they are interested, how do you help them get involved?
- How do you address some of the barriers to entering business school?

Specific Ideas that could be integrated into the event or longer-term goals

- Create games. For example, MNP is going into elementary schools to teach how to budget by gamifying it.
- Create a TedTalk, featuring an Indigenous CPA.
- Demonstrate a skill, like the value of understanding spreadsheets, using an interactive presentation e.g., when trading stocks, what makes a company good to invest in.
- Through storytelling, provide the confidence that they can succeed at math or business.
- Develop Indigenous student internships at companies.
- Create mentorship opportunities for Indigenous students.
- Online format is the way to go – able to reach more audiences
- Traditional way to transfer knowledge is key
- It is also important to work with communities to create excitement – if we focus on Vancouver communities, we would be able to rely on internet access as well

Closing Thoughts

Through community building and the sharing circle, much can be accomplished. We need to make accounting more tangible to those who are interested by highlighting success stories so we can ensure more Indigenous students consider careers in accounting.

By collaborating with a broad and inclusive group, this event will raise the tide for everyone interested in business. Meeting attendees were excited to work towards more Indigenous representation in business and accounting. This event will allow us to come together, combine strengths, and build relationships. It is the beginning of a process and a journey where we can collaborate to make meaningful change through awakening, recognition, and inclusivity.

Next Steps

The group will reconvene in the new year to continue the discussion and advance the event plan. CPABC will circulate a doodle poll to the other participants to determine the next meeting date.