



# CPA ALBERTA ACHIEVEMENT AWARDS

## Sample Support Documentation— Distinguished Accomplishment Award

### 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](mailto:awards@cpaalberta.ca).**

## Letter of Support—Distinguished Accomplishment Award Nominee (CPA Alberta Member)

Re: Nomination of Gini Walker CPA for a Distinguished Accomplishment Award

Dear Committee Members,

For over five years, Gini has been an integral and vital member of the Families Network Society (FNS), which provides food donations, financial support, and other targeted programs to members of the Calgary community in need. Gini has selflessly committed countless hours to ensure that FNS continually directs its effort towards the betterment of the local community at large and concurrently also addresses upcoming support areas such as refugee support.

Key highlights of Gini's involvement with FNS include:

- **Leading and organizing the annual food and clothing drive.** This is the single most important yearly event that FNS organizes to expand the organization's community reach, serving people with key household grocery staple items, providing financial aid support, directing clothing donations for people in need, boosting donation support, and increasing volunteer signups. For as long as I can recall (7+ years), Gini has always been tasked as "commander and general" of this event as she essentially manages the role of 5-8 people, from logistics of food/clothing to the event, outreach communication, communicating roles/responsibilities to volunteers, training people, booking/setup/teardown/cleanup of the venue, coordinating additional volunteers from her other various community efforts, handling media relationships such as XYZ news, and also ensuring that no food item or piece of clothing goes to waste (directing them to other organizations at the end of the day).
- **Community refugee and immigrant support.** Gini always directs the FNS board towards the most pressing issue in the community,. Most recently, when we had an influx of refugees, Gini encouraged, gained alignment, and then helped us organize smaller outreach projects to provide food/financial support to newcomers in need.
- **Single mothers' self-sufficiency program.** This program was the result of Gini encouraging FNS to provide financial literacy to single mothers in the community. Gini then helped build a fully-fledged program that included mental health support, language literacy support, legal assistance, and parenting workshops. This initiative was remarkably successful and well received by single mothers to the extent that we are now launching additional phases. Had Gini not brought up this initiative, we would not be serving these important members of our community. In addition, Gini also developed and presented key content, such as the financial literacy portion.

- **Expanding FNS support/outreach.** An initiative that Gini also spearheaded was to ensure that FNS support of any type was not limited to the local community. The inception of FNS was to primarily provide 'halal' food bank services, however, Gini pushed the organization to take an integrated approach in providing community support to all members of the community who are in need. Because of this approach, FNS openly supports anyone in need.

A particular characteristic that sets Gini apart from her peers in the community service space, is that she always maintains a high professional standard and demeanor to her responsibilities. This means that Gini is the most punctual person, attends all key meetings, is driven in areas of responsibility, and holds other volunteers accountable for their respective duties. I can confidently say that FNS would not have achieved its goals without Gini's continued support and drive.

I hereby recommend, based on the professional leadership and service that Gini has provided to FNS, that she be recognized for the Distinguished Accomplishment Award by CPA Alberta. Please contact me if you need more information or clarifications on Gini's community contributions.

**Larry Rains**

Chair, Board of Directors  
Families Network Society

## Letter of Support—Distinguished Accomplishment Award Nominee (CPA Alberta Member)

Re: Nomination of Colleen MacDonald CPA for a Distinguished Accomplishment Award

Dear Committee Members,

I am writing in support of the nomination of Colleen MacDonald CPA, to be honoured with the Distinguished Accomplishment Award. Colleen has made significant contributions to members of our profession across the country.

### *Diverse Contributions to the Profession*

The Committee will doubtless receive letters of recommendation citing Colleen's efforts in maintaining and enhancing the tax knowledge of CPAs and others in the tax, accounting, and business community. For example, Colleen spearheaded the monthly *Tax World* video and podcast update, a monthly 10-minute summary of recent tax developments available at no cost through sources including the XYZ Company website and TaxTipsForYou.com since July, 201X. She also founded the ABC Group, a weekly online forum where practitioners come together to discuss tax issues and share knowledge.

Others will cite Colleen's many contributions through our professional association. These contributions include her longstanding annual involvement in educational clinics for volunteers at CPA Alberta and CPA Saskatchewan tax clinics, her service on the CPA Alberta Tax Working Group, and vetting questions for the CPA Alberta—CRA (Canada Revenue Agency) Tax Roundtables.

Colleen's contributions to tax education, both through XYZ Company and through other groups including the Canadian Tax Foundation and the Law Now online publication by the Center for Public Legal Education, as well as less formal presentations to smaller groups, will doubtless also be mentioned.

### *Leadership through the COVID-19 Pandemic*

However, I wish to focus my own letter of recommendation on Colleen's tireless efforts over the past 18 months (about one and a half years) helping Canada's tax professionals guide their clients through the unprecedented challenges of the COVID-19 pandemic and its attendant government programs.

Colleen spearheaded, and maintained, a public domain webpage of COVID-19 Updates and Resources for Accounting Professionals, providing real-time updates as new developments occurred. The numerous updates since March, 202X assembled here guided practitioners across Canada through the maze of ever-changing COVID-19 relief programs, a comment the writer sees echoed routinely by practitioners across Canada on social media like the LinkedIn platform. To mid-September, 202X, there had been over 160,000 views of this webpage, reflecting over 100,000 unique visitors (determined through Google Analytics). The webpage continues and Colleen is constantly on the lookout for new developments, which she communicates through social media activity building awareness of this resource.

When timely materials to which practitioners could be referred were not available, Colleen led the XYZ Company team to create these materials. Nowhere was that more evident than in the one-hour online seminar on the Canada Emergency Wage Subsidy (CEWS), presented on April 27, 202X, the day applications for the program opened, and made available to all interested parties, on a voluntary payment basis. As seen at this webpage, payment in the form of contributions to Chambers of Commerce or other business support groups, or any means of paying it forward within the ability and resources of the participant, was encouraged. There were over 1,800 registrants for the online seminar.

To assist advisors in communicating the COVID-19 programs to their clients, Colleen also spearheaded the creation of a “brandable newsletter”. This publication was made available at no cost to the accounting community in March, 202X. The download page was viewed over 6,000 times to mid-September, 202X. A second such newsletter, offered on a “pay what you can” basis (“If you can’t afford it, it is FREE”), announced on April 1, 202X, attracted over 500 subscribers.

Colleen also worked with ABC to launch an online Canada Emergency Wage Subsidy (CEWS) Estimator to assist businesses and their advisors in evaluating various alternatives available under the initial CEWS program. The Estimator launched in the summer of 202X, and was maintained until June 202X, by which time the guidance and calculators available from CRA had matured.

The above examples highlight Colleen’s tireless leadership of the tax and business advisory community through the COVID-19 pandemic. I am proud to be associated, through my own activity with XYZ Company, with this dedicated service to our profession, spearheaded and lead by Colleen. Her leadership and service through the COVID-19 pandemic is only one example, albeit a huge one of her dedication to the Canadian tax and accounting community. Her passion for helping our members navigate the myriad of COVID-19 relief measures, benefiting countless Canadians, exemplifies why she merits the honour of being awarded the Distinguished Accomplishment Award.

Yours truly,

**Carter Nelson CPA**

## **Letter of Support—Distinguished Accomplishment Award Nominee (Non-CPA Alberta Member)**

**Re: Nomination of Samantha Jones for a Distinguished Accomplishment Award**

**Dear Committee Members,**

It is with immense pleasure I write a support letter for the Distinguished Accomplishment Award for Samantha Jones. I serve as the President and CEO of XYZ Canada. XYZ Canada was founded as a not-for-profit association in 199X to help Indigenous people better manage and govern their communities and organizations by focusing on enhancing management, finance, and governance practices and skills. XYZ Canada's premise is that one of the keys to successful self-determination, creating a better life for Canada's Indigenous people and a better future for the next generation, lies in improving the management skills of those responsible for the stewardship of Indigenous resources.

After over twenty years in operation, XYZ Canada has become the centre for excellence and innovation in Indigenous management, finance, and governance. It is the only organization in Canada that focuses on the capacity development and day-to-day needs of those Indigenous professionals who are working in all areas of management, finance, band administration, leadership, and program management.

Samantha has served in a volunteer capacity as the vice chair (201X-201X) to assist in the governance and oversight of the organization. Samantha has a calm demeanor, and a results-orientation that can marshal support with a diverse board of directors, which she demonstrated in this role.

In 200X, Samantha was a founding member of XYZ Alberta. Indeed, since 201X, she has been the chair of the board of directors and has helped the chapter make remarkable achievements with her leadership and stewardship. Samantha also sees the value of partnerships to leverage the organization's competencies, which have helped elevate the provincial chapter to one of our most successful with impacts beyond the provincial borders. XYZ Alberta, through several collaborations and partnerships with the CPA Alberta Education Foundation and, more recently, with the CPA Western School of Business, has contributed remarkably to enhancing First Nation and Indigenous managerial and accounting capacity. Specifically, Samantha, in creating a shared vision, helped to guide the organization to establish a dedicated management training center for Indigenous people located on the ABC Nation. With a donation from the CPA Alberta Education Foundation, this state-of-the-art training center was dedicated to the CPA Alberta donors to the EFG campaign in 202X.

This is no small achievement as the organization operates as a not-for-profit and needed to raise approximately one-quarter of a million dollars with its own source revenue to design, develop and equip the two-room center. The center has allowed XYZ Alberta to expand its managerial offerings and simultaneously drive down costs, contributing to the organization's sustainability.

Samantha also helped to guide and direct the organization into a multi-element agreement with ABC University (ABC). In 2018, XYZ Alberta and ABC entered a partnership to deliver management courses at the undergraduate level in a unique way that addressed the systemic barriers these learners face. It was a resounding success, with over thirty Indigenous and First Nation members currently pursuing their Bachelor of Commerce degree through this unique program. This program resulted in a new Major in Indigenous Business as part of the Bachelor of Commerce degree and the further development of an undergraduate Certificate in Indigenous Community Economic Development and Planning, approved in 202X by the provincial Ministry of Advanced Education. This program was developed by Indigenous scholars and is taught by Indigenous scholars and is believed to be the first of its kind in Canada. Part of the cost to develop the program was through the EFG campaign with the CPA Alberta Education Foundation.

XYZ Alberta was invited to partner with CPA Western School of Business this year to help create pilot programs for Indigenous learners. XYZ Alberta has accepted and is currently working with the CPA Western School of Business to further enhance Indigenous education. Under the leadership of Samantha, a vision to improve First Nation and Indigenous communities through management and accounting has led to the opportunity to contribute to Indigenous education in a meaningful, authentic, and sustainable way.

Therefore, it is my privilege to strongly support Samantha's nomination for this special award, which recognizes non-CPAs and CPAs that have strongly contributed to the accounting profession. While Samantha opted to serve her community through her accounting training, her desire to improve Indigenous people's lives is evident in her life-long support of the accounting profession through her work with XYZ Canada.

Regards,

**Lee Majors**

President and CEO

XYZ Canada

## Letter of Support—Distinguished Accomplishment Award Nominee (Non-CPA Alberta Member)

**Re: Nomination of Samantha Jones for a Distinguished Accomplishment Award**

**Dear Committee Members,**

For more than twenty years, Samantha Jones has committed herself and has been a volunteer on the Board of Directors of XYZ Alberta where she has committed her time and vast knowledge. I am pleased to write this letter of support for Samantha for the Distinguished Accomplishment Award. XYZ Alberta is an organization with a vision of building a community of indigenous professionals and improving the quality of life of indigenous people.

Samantha was a founding member of XYZ Alberta and has been the president since inception. Samantha along with the other founding members had an initial vision of building financial capacity within indigenous communities and organizations. Under Samantha's leadership as the president, the organization has grown from a small organization focused on indigenous financial managers only, to creating value added training and capacity development for not only indigenous financial leaders but has now expanded to include management (band managers, program managers, executive directors, chief executive officers and other management team members) and governance (chief and council, board members).

Under Samantha's leadership the organization has gone from holding outsourced workshops to developing its own value created course content and tools, creating a learning centre, developing key relationships with post-secondary institutions and a key relationship with CPA Education Foundation of Alberta with regards to the EFG partnership.

As XYZ Alberta evolved and grew there was a need for more than just outside speakers to come and present. Samantha, along with our executive director, saw a need to grow and start developing courses and tools that could be taken back to the communities and used to build capacity. Courses were developed in budgeting, workplace communication, structured problem solving, and governance and management assessment as these were issues in Indigenous communities that Samantha was seeing having worked for many years as a financial manager and senior management capacities within her community and Indigenous organizations. Along with these courses, tools for best practices, assessment tools and a guidebook to problem solving were developed as value added tools to take back to communities. As a result of the course and capacity development, XYZ Alberta was able to develop its own learning center in 202X which is located on the ABC Nation. The learning centre was a huge accomplishment and a dream of Samantha, the board and the executive director and Samantha was a significant guiding force for this coming to be.



Also, within the last five years, Samantha has been instrumental in the development of key relationships with post-secondary institutions, most recently the partnership with ABC University (ABC). This partnership has allowed Indigenous students to further their education through online learning to obtain a post-secondary degree. The student starts within XYZ Alberta under the Certified Aboriginal Financial Management Program and then courses are transferrable to obtaining a finance/accounting degree through ABC.

Samantha was also instrumental in developing the relationship with the CPA Foundation of Alberta regarding the EFG campaign partnership. The goal is to increase and create opportunities for indigenous Albertans, so the values of both organizations fit very well together, and the partnership was formed.

Samantha is always attending XYZ Alberta and national XYZ events and has attended several of the graduations of the students from the programs over the year—she really goes above and beyond what it means to be a member of a board. There really has been no one more committed and passionate about XYZ Alberta and higher education of Indigenous people than Samantha.

It is recommended that the commitment, leadership and twenty plus years of service Samantha has provided to XYZ Alberta make Samantha Jones a worthy individual for a Distinguished Accomplishment Award.

Regards,

**Lawrence Williams CPA**  
Partner, Indigenous Services