



The Institute of
Internal Auditors

IIA Edmonton Chapter

Business Plan 2022 to 2023

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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 400 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	2021-2022 MEMBERS
President	Janine Mryglod
Vice President Programs	Lori Sunde-Cooper
Vice President Membership & Certifications	Rachelle Paquette
Secretary	Zahir Kachwalla
Treasurer	Andy Chen
Director CAP Reporting	Shivana Mahabir
Director CAE Support	Jennifer Freitas
Director Academic Relations	Sophia Kasozi
Director Communications	Duminda Chandraratne
Director Communications	John Mikhail
Director Communications	Ed Fong
Director Program Support	Elvin Smith
Director Program Support	Nikki Sandie
Director	Atif Pervez

Our Plan 2022 to 2023

1. CAP Requirements

- The basic CAP requirements generally remain consistent with the previous year.
- Track CAP requirements on a monthly basis, ensuring that we attain 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 2022 to 2023 (cont'd)

2. 2022-23 Programming

- Programming has been refreshed for 2022/23 with topics included ESG, ethics etc.
- Board Consideration:
 - An in person event in December. We will need to monitor member appetite for in person sessions.
 - In person/hybrid AGM
 - Social event
- **Career Fairs:** IIA Edmonton Chapter to attend the following career fairs:
 - U of A
 - MacEwan
 - NAIT
 - Concordia

Our Plan 2022 to 2023 (cont'd)

3. 2022-23 Programming

- **Partnerships:**
 - To connect with other professional organizations such as NARIMS etc. to work together with their Board (i.e., focuses on promoting each other's luncheons and designations).
- **IIA Designations Slide:**
 - Promote IIA's designations at our CPE luncheons. The hope is to have this slide presented as part of the introduction of a speaker the Programming team will make.

4. Other Areas of Focus / Activities

- **CAE Engagement/Roundtable (in Oct and May)**
- **CIA Premier Partner program:**
 - 2022-23 Requirements – Board to explore how to meet the requirements of this year's program.

Our Plan 2022 to 2023 (cont'd)

5. Treasury

- Annual Report of Revenue and Expenses Review for submission to IIA (*provided to IIA HQ under separate cover*).
- 2022-23 Budget and Giving Pledge Form (*provided to IIA HQ under separate cover*).

Our Budget 2022 to 2023

The budget has been provided to IIA HQ as part of the September 30 submissions for CAP. A screenshot is provided below.

Chapter Budget Form - Please complete this form in English and US Dollars.			
Revenue			
	2022 - 2023 Budget (Current year)	2021 - 2022 Actual (Last year)	Difference
Meetings / Seminar Revenue	\$4,600.00	\$76.18	\$4,523.82
Conference Revenue	\$23,000.00	\$23,332.49	-\$332.49
Sponsorship/Advertising Revenue	\$1,250.00	\$1,250.00	\$0.00
Interest/Dividend Revenue	\$300.00	\$356.96	-\$56.96
Allocation from IIA HQ	\$4,000.00	\$3,698.25	\$301.75
Miscellaneous Revenue (Describe)			\$0.00
			\$0.00
			\$0.00
			\$0.00
Total Revenue	\$33,150.00	\$28,713.88	\$4,436.12
Expenses			
	2022 - 2023 Budget	2021 - 2022 Actual	Difference
Meetings / Seminar Expense	\$18,000.00	\$400.00	\$17,600.00
Conference Expense	\$13,500.00	\$12,693.42	\$806.58
Chapter Administration and Board Expenses	\$750.00		\$750.00
Postage, Stationary, Advertising and Communication Expenses	\$40.00		\$40.00
Credit card processing fees (Paypal, bank, etc.)	\$340.00	\$56.52	\$283.48
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)			\$0.00
District Representative and District Advisor Support			\$0.00
Awards, Plaques, etc.			\$0.00
Scholarship Award Fees	\$0.00		\$0.00
Honorariums			\$0.00
President Expenses			\$0.00
Committee Expenses (Audit Committee)	\$6,250.00	\$2,222.20	\$4,027.80
Committee Expenses (Social Committee)	\$5,000.00		\$5,000.00
Committee Expenses (Membership)	\$8,800.00		\$8,800.00
Committee Expenses (Communications)	\$1,500.00		\$1,500.00
Donation to Internal Audit Foundation	\$900.00	\$1,100.00	-\$200.00
Donate to other IIA Initiatives			\$0.00
Support for other IIA Chapters	\$4,200.00		\$4,200.00
Insurance			\$0.00
Depreciation Expense			\$0.00
Bad Debt Expense			\$0.00
Miscellaneous (Describe)			\$0.00
			\$0.00
			\$0.00
Total Expenses:	59640	16832.14	42807.86
Net Surplus (Deficit)	-\$26,490.00	\$11,881.74	-\$38,371.74

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