

## The Okanagan awaits you!

The Conference organizers and local committee have a wonderful conference prepared for you in Kelowna. We have featured many of our key speakers like Catriona Lemay Doan, Harry Kitchen and Michael Puskaric in previous issues. We'd like to introduce you to a couple more feature speakers here, along with a couple of our special sessions. Our great debate this year will be on whether Canadian Cities should get a share of sales tax.

We are very pleased to have **Bob Thompson** of Canaccord Genuity Wealth Management presenting Thursday morning in a session entitled: "Are we in a housing Bubble".



Bob has written extensively on this issue, including an article in McLean's magazine earlier this year.



**Helmut Pastrick** of Central 1 Credit Union will be our economist this year. Helmut's years spent analyzing and forecasting the B.C. housing market and economy at Canada Mortgage and Housing Corporation, combined with his former role as President of the Association of Professional Economists of B.C. and as a current member of B.C.'s Economic Forecast Council, make him a sought-after media contributor and speaker across the country. We are honoured to have him addressing our conference.

### Communities in Change

What does a finance officer do when major changes affect their community? Victor Mema will moderate a panel: Elsie Hutton, CFO at the RMWB will talk of the financial impact of the Fort McMurray wild-fire, Esther Lee of City of Vancouver will talk about the dramatic spike in real estate prices and Steve Brown has been invited to talk about drinking water contamination in Prince Albert. Outside events can have a dramatic financial impact and we have a lot to learn from colleagues who have experienced these events.



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# WESTERN CANADA



## President's Report: Kelly Gibson, Town of Banff AB



It has been a busy year for finance officers in Canada. As well as all the usual events and commitments, GFOA held its North American conference in Toronto at the end of May and I know many of you attended. It was so great for Canadian finance officers to get together. GFOAWC now has over 350 members who will be eligible to directly elect our board in Kelowna in September. I encourage any members who are interested in being on the board to contact me to discuss the responsibilities. In the meantime, the board has appointed Victor Mema of the City of Nanaimo to fill the BC position left vacant when Dean Rear did not run last year. I know Victor from his several years' involvement with Alberta GFOA and look forward to working with him again.

I am looking forward to seeing as many of you as possible in Kelowna..

## Notice of AGM

The Annual General Meeting of the Government Finance Officers of Western Canada will be held at the Delta Okanagan Resort in Kelowna on Thursday September 22nd, 2016. Agenda will include President's report, Treasurer's report, receiving the audited financial statements and the election of a new Board

## 2016/2017 Board election

Under our new bylaws (revised February 2016), we are allowed to have up to 15 directors; with no more than two from any province or territory. All Board members will be elected for a one year term by the members present at the annual general meeting. Please contact any of the current Board if you are interested in running.



WCGFOA Annual General Meeting in Calgary 2014

## GOLD SPONSORS



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# WESTERN CANADA



## Style & Substance:

### 3 questions to answer before report design

When finance is asked to prepare a new report or redesign an existing report, many decisions need to be made. In our experience, formally dealing with these decisions is rare. We suggest that when tackling a new report or re-developing an old one, three questions need to be asked during the design phase. We will list them here and then concentrate on the third one:

**Question 1 - "Who?"** Knowing who the likely user of the report is, should make a critical difference in report design decisions.

**Question 2 - "What?"** The first, most fundamental "What" question is "What answers are readers trying to get with this report?"

**Question 3 - "How?"** For finance professionals, the "How" can be most challenging; formal training on how to present the data and how presentation choices can affect interpretation is not common-place. Consequently the answer to "How?" is often "Let's throw the data in a table with several columns and rows. That'll satisfy them!"

Here are some guidelines (at a high level) for how best to present our data. There are three different devices we might use to assemble our report:

**Tables:** A table encodes quantitative data as text. Tables are the right choice when:

- the exact value is important.
- comparison of exact values is important.
- there are multiple units of measure to be displayed together.

**Graphs:** A graph encodes quantitative data visually. They are best used when:

- the message you wish to communicate is best understood in patterns, relationships among and between quantitative values & exceptions.
- there is no need for precise numbers or to compare individual values.
- there is a need to show much more complex relationships.
- vary large data sets must be presented.

**Narrative Text:** Complements graphs and tables. Consider using narrative text to:

- Introduce a topic, a problem, a business process or other item the reader might not be fully conversant on.
- Explain the graph or the table so the reader does not miss any nuances.
- Highlight or calling out a particular point in a table or graph.
- Label a particular data point in a graph, or columns/rows in a table.
- Recommend appropriate next steps or actions.

**Jamie Black** is a principal with F.H. Black and Company. For a full version of this article go to <https://blog.fhblackinc.com/3-essential-questions-to-answer-before-pre-report-design>



## SILVER SPONSORS





## The GFOA Family in Canada

### Committee on Canadian Issues



The mission of the Committee is to advise GFOA's Board and staff on:

- the Canadian implications of issues under review by the Executive Board,
- ways to assist Canadian governments with issues specific to them,
- ways to better serve GFOA Canadian members, and ways to increase GFOA membership in Canada.

#### Members of the Committee

Catherine Brubacher, City of Brantford, ON  
Suzanne Fillion, City of Surrey, BC  
Kevin Bertles, City of Vernon, BC  
Jeffrey Dalley, City of Yellowknife, NT  
Jackie Dueck, City of Kelowna, BC  
Bruce Fisher, Halifax Regional Municipality, NS  
Clae Hack, City of Saskatoon, SK  
Patrice Impey, City of Vancouver, BC  
Glen Jarbeau, City of Spruce Grove, AB  
Josie La Vita, City of Toronto, ON  
Rick Masters, City of Calgary, AB  
Paul Olafson, City of Winnipeg, MB  
Tina Tapley, City of Fredericton, NB  
Yves Prosper Tedom, Town of Hampstead, QC  
Valentina Todoran, Montreal-West, QC  
Fuwing Wong, Town of Caledon, ON.

The committee meets in January each year in Canada and at the International Conference in May.

### Alberta GFOA



Today our organization boasts over 800 members and serves a pivotal role in ensuring the financial well being of local government in our province. The growth and vitality we have realized, especially in recent years, bears witness to the ever-increasing value of our products and services.

### GFOA of British Columbia



#### FALL PD COURSES

Vancouver, November 9 & 10 2016



#### Courses Being Offered:

Advanced Budgeting	Debt Financing	Reserves
Property Tax Policy & Rates	Internal Controls	User Fees

### The Municipal Finance Officers of Ontario,



established in 1989, is the professional association of municipal finance officers with more than 2,300 individual members. We represent individuals who are responsible for handling the financial affairs of municipalities and who are key advisors to councils on matters of finance policy.

### Upcoming GFOA Conferences:

#### September 21-23, 2016;

WCGFOA conference in Kelowna, BC.

#### September 21-23, 2016;

MFOA conference in Niagara Falls, Ontario.

#### May 21-24, 2017;

GFOA of U.S. and Canada in Denver, Colorado.

# WESTERN CANADA



## Members of the Month

June 2016

**Michael Minchin, CPA, CMA, CLGM**  
**City of Lacombe**

Michael has been the Corporate Services Director for the City of Lacombe for the past 9 years and is also the CAO for the North Red Deer Water Services Commission. He spent 6 years on the board of the Alberta GFOA from 2002 to 2008 and also served for a period of time on the Western GFOA Board. Michael continues to be involved in GFOA matters as a member of Alberta GFOA's Emerging Issues Task Force.

August 2016



**Vesuvia (Vee) Scromeda, CMMA**  
**Deputy CAO**  
**RM of West St. Paul, Manitoba**

I started my career in municipal government in 1990 with the City of Selkirk working in various capacities from Junior Clerk to Public Works, Finance, the Mayor's office, to the Manager of Accounting. In 2010 I became the Deputy Chief Administrative Officer with the Rural Municipality of West St. Paul. Working for West St. Paul for the past 6 years has provided me many opportunities and experiences for my personal growth as a Manitoba Municipal Administrator. Being a part of GFOA of Western Canada has provided me with networking opportunities that have allowed me to further enhance my leadership skills while connecting with people in the field.

July 2016



**Jason K. Turnbull, CPA, CMA**  
**City of Saskatoon**

As a fresh Certified Management Accountant, CMA (now CPA, CMA), graduate moving from Alberta to Saskatchewan, I was keen on working for an organization that has an impact on where I live, so I began my municipal career with the City of Saskatoon in 2005. Working with such a diverse corporation such as the City has allowed me many opportunities starting as an entry level accountant all the way to my current role of Director of Business Administration responsible for the finances of two departments within our organization. Being part of the membership of GFOA of Western Canada has provided me with many resources and insights into the world of municipal governance and has allowed me to bring new focus to the work I do with the City of Saskatoon.

## BRONZE SPONSORS



## Member and Sponsor of the Month Program

In June, we started our member of the month program. Each month we draw the name of a member and ask them for their photo and a short biography to post on our website. Sometimes we feature them in the newsletter. In return the member is awarded a small prize from our sponsor of the month. Sponsors volunteer for this opportunity and in return get their name featured on our monthly email and other social media outlets.

The volunteers for Sponsor of the month for 2016 so far are:

**July—CaseWare**

**August—AON**

**September—BDO**

**October—Canaccord**

**November—BMO**

**December—Eckler**

If you are a sponsor and would like to participate, please email [Susan](mailto:Susan).

# WESTERN CANADA



## Kelowna, B.C. September 21st to 23rd 2016



### Events

Included in your delegate registration are two special events:

There will be a **welcome reception** on Tuesday evening at 7pm at the Rotary Centre for the Arts a few minutes walk from the hotel. Attend and connect with old friends.

There will be a **banquet** on Thursday evening at the Delta Okanagan Resort. A murder will be staged during the meal and you will be invited to figure out who committed it.

### Registration

The conference cost is \$650. You can register now at:  
<http://www.civicinfo.bc.ca/event/2016/GFOAWCDelegates.asp>

### Hotel

The Delta Grand Okanagan Resort is nearly full. Go to [Booking site](#). to see if they still have rooms. If not, there are rooms still available at the Coast Capri and other hotels on Harvie Ave.

### Transportation

Complimentary Airport shuttle service, Phone: 1 (778) 821-0101  
Estimated airport taxi fare: \$35  
On-site parking: \$20 Day

### Motorcycle ride

On Tuesday September 20th, enjoy an afternoon motorcycle ride with a group of like minded delegates, then enjoy a bratwurst barbecue. You can rent a bike in Kelowna or ride your own.

Please email [Marissa](#) or check [here](#) for more details



### Wine tours

We have organized a special wine tour for our delegates and their guests on the afternoon of September 23rd. The bus will leave the hotel at 1:00pm and return at 5:15pm.

Please email:  
[Susan Broadfoot](#)  
for more details.

