

Awards of Excellence in Corporate Reporting

CFA Panel (Financial Reporting)

Position Description: CFA Panel lead judge

About the awards

The Awards of Excellence in Corporate Reporting are the most prestigious and coveted national awards of their kind. In addition to recognizing the best reporting practices of Crown organizations and Canadian listed companies, the awards raise the overall bar in corporate reporting. Entrants receive confidential assessments from the independent judging panel detailing how they measure against current benchmarks and making recommendations for improvement.

Winning companies are honoured at an awards gala in Toronto in December and featured in the Judges' Book - a commemorative publication that explains the distinguishing features of the top reports.

The program is open to publicly listed companies and Crown organizations.

About the judging process

The independent panel of judges is the backbone of the program. Each year, over 80 professionals with expertise in Financial Reporting, Electronic Disclosure, Sustainability Reporting and Corporate Governance Disclosure participate in the program. (Crowns are judged in a separate track that focuses on Financial Reporting.) Entrants are assessed against predetermined criteria in each judging category.

Judges' comments are provided to entrants to help them implement year-over-year improvements. Entrants are not provided with the names of the judges that have reviewed their materials and judges are prohibited from meeting with entrants to discuss findings or recommendations. Judges are required to self-identify any conflicts of interest.

About the CFA panel

The CFA judging panel is one of three panels that fall within the Financial Reporting judging category. The other two panels are a) Chartered Professional Accountants, and b) investor relations professionals who hold CIRI memberships. Judges on each panel assess entrants' materials against established criteria.

About the CFA lead judge role

The lead judge of the CFA panel plays a critical role in the awards program, providing oversight and leadership to a dedicated team of volunteers.



Primary responsibilities are:

- participate in Financial Reporting leadership team joining:
 - Ron Salole, lead judge CPA Canada panel (also overall Head Judge for the program)
 - Jane Maciel, lead judge CIRI panel
- assist CPA Canada in recruitment of judges for the CFA panel and ensures judges have the required expertise to judge entrants' financial reporting materials from the perspective of a financial analyst
- participate in two or three meetings of the Financial Reporting judging panel: judging kick off, midpoint check in, winner selection (meetings are typically conference calls)
- review work of CFA judges for quality control purposes
- participate in selection of winners in Financial Reporting judging category

Timeline

May/June

- recruiting CFA panel judges

July 24 – September 13

- Judging period
- Provide guidance to judges as required through judging period
- Review work of judges for quality control purposes

September 13 – October 3

- Winner selection process (participate in two or three conference calls)

December

- Awards gala (complimentary ticket provided): December 6, 2017, The Carlu

Meeting dates (conference calls)

- Kick off call: July 25, 2:00 PM EDT
- Mid-point check in: September 6, 2:00 PM EDT
- Short listing meeting: September 24, 2:00 PM EDT
- Winner selection meeting: September 27, 2:00 PM EDT