

Certificate in Leadership



CPAONTARIO.CA



THE IVEY
ACADEMY





**WORLD-CLASS
IVEY FACULTY**



**CASE BASED
EXPERIENTIAL
LEARNING**



**NETWORK WITH CPAs
ACROSS SECTORS**

ENHANCE YOUR LEADERSHIP

Change is a constant and organizations are continually evolving to keep up with the world around them, relying on leaders who can adapt and find opportunities through disruption.

Leading through change is no easy task. Therefore, in partnership with the Ivey Academy at Ivey Business School, we have developed a suite of professional development programs specifically tailored for CPAs to accelerate key leadership skills.

Select the path that's best for you: take courses individually, take three courses to gain a Certificate in Leadership or take five courses of your choice and a capstone to gain a Master Certificate in Leadership. Combine course material from a range of cutting-edge business topics – from diversity to analytics – and find practical ways to add new value for your organization.

WHAT DO I EARN?



DIGITAL BADGE

Upon completion
of a course



CERTIFICATE OF LEADERSHIP

Upon completion
of three courses



MASTER CERTIFICATE OF LEADERSHIP

Upon completion
of five courses
and a Capstone
exercise



LEARNING DESIGNED FOR YOU

These individual programs and certificates are for CPAs and financial professionals who want to grow within their careers and progress into advanced leadership roles.

As a leader, you are interested in sharpening your people, team, and organizational leadership skills to inspire teams and drive performance. By selecting from a range of courses focused on critical leadership challenges, you'll learn to shape an organizational vision and manage change through disruption.

TESTIMONIALS



“My goal is to elevate my leadership skills and elevate my career. This program was a great fit and gave me so much to take back into my role. It was so beneficial to learn with other CPAs, especially in different industries and at different points in their career journeys. The virtual classroom helped us connect and build community in a way that has deeply changed how I think about my professional development going forwards.”

Margarita de Guzman
Associate Vice President, Corporate Transformation & Operations at TD – CPA, CA, CISA, MAcc, BComm

“People management, driving change, and other soft skills will become even more important in the future of finance. The roles that CPAs are playing go beyond the numbers these days: you’re involved in strategy, transformation, and finding ways to leverage technology. As a CPA, the more tools you have in your arsenal, the more relevant and versatile you are in your career and I’m glad to have had the opportunity to enhance my skillset.”

Aziz Garuba Jr., MBA, CFE, CPA, CMA, CA(SA)
RBC Capital Markets

COURSE OFFERINGS

The content in these program offerings is specifically tailored to the experiences of a CPA, with cases, simulations, and learning outcomes reflecting the issues CPAs will face in their careers. With courses that delve into specific aspects of personal, team, and organizational leadership, you'll walk away with the skills and confidence of a modern leader.

FALL 2021 COURSES

Strategic Thinking and Decision-Making for CPAs – November 9

- Learn to evaluate position and evidence to plan strategic action, overcome decision traps, and increase your decision readiness and confidence.
- Structure – 20 hours (11 hours of in-class and 9 hours of pre-work) over four virtual sessions
- \$2,400

Communication & Leadership Presence for CPAs – October 18

- Learn how to cultivate your leadership presence by identifying and bringing your best self forward. Hone your communication skills, receive coaching from top-rated Ivey faculty, and practice with a peer network of other leaders.
- Structure – 32 hours (20 hours of in-class and 12 hours of pre-work) over five virtual sessions
- Price \$ 3,500

UPCOMING COURSES

Management in the Data Era for CPAs

- A comprehensive overview of practical data analytics, as well as a hands-on look at the mechanics behind Artificial Intelligence.
- Structure - 20 hours (which includes in-class and pre-work) over four virtual sessions
- Price \$3,500

Inequality, Diversity and Organizations

- Understand the barriers to creating equitable work environments and learn how to cultivate a culture of diversity and inclusion within your organization.
- Structure - 24 hours (which includes in-class and pre-work) over four virtual sessions
- Price \$4,800

Designing for an Interconnected World as a CPA

- Build a resilient, sustainable organization with contemporary insights on systems design.
- Structure - 25 hours (which includes in-class and pre-work) over four virtual sessions
- Price \$4,800

Elevate: Ivey Leadership Program for CPAs

- Sharpen your skills to inspire people and teams, lead through disruption and manage change, and drive results within your organization.
- Structure - 36 hours (which includes in-class and pre-work) over eight virtual sessions
- Price \$4,800

Strategic Negotiations for CPAs

- Develop a practical and successful negotiation approach that can be applied anywhere, anytime.
- Structure - 25 hours (17 hours of in-class and 8 hours of pre-work) over four virtual sessions
- Price \$ 2,400

UPCOMING COURSES

Predicting Success; “Great Ideas” for CPAs

- Learn how to evaluate new product ideas, use AI and big data to develop customer insights, and predict launch trajectory within unconventional markets.
- Structure - 25 hours (which includes in-class and pre-work) over eight virtual sessions
- Price \$4,800

Leadership Journey for CPAs: Finding Purpose in Crisis

- Find resilience through disruption. Level up your leadership capabilities and find your inner motivations to lead.
- Structure: 20 hours over (which includes in-class and pre-work) four virtual sessions
- Price \$3,500

Managing for Innovation for CPAs

- Explore different approaches to innovation, confront some inherent challenges, and devise strategies to overcome them. Gain the skills to defy past thinking - even in examples where innovation has worked in the past - break old habits, and tackle future challenges as an “innovation manager”.
- Structure - 24 hours (which includes in-class and pre-work) over four virtual sessions
- Price \$2,400

CERTIFICATE IN LEADERSHIP

Each completed course awards a digital badge to signify your accomplishment. You can share these badges across social media, websites, ePortfolios, professional networks, and email signatures to highlight your enhanced skillset and expertise.

After completing three programs of your choice, you will receive a Certificate in Leadership. This powerful credential signifies your diverse leadership skillset and ability to manage through disruption.

MASTER CERTIFICATE IN LEADERSHIP

After completing five programs of your choice and a capstone learning experience, you will receive a Master Certificate in Leadership. This advanced credential recognizes your ongoing commitment to personal leadership development and deep understanding across a range of critical modern business challenges.



HOW YOU LEARN

Self-Paced Learning Activities: Prepare for live sessions using pre-recorded videos, readings, and case studies – delivered at a flexible pace through our Canvas learning management system. Discuss ideas with your peers via a private forum and complete guided self-reflections to help apply key takeaways in your own role.

Live Virtual Faculty-Led Sessions: Join live sessions featuring expert Ivey faculty using any computer, tablet, or mobile device. With the help of a live virtual IT assistant and co-pilot, we use polling, chat, and video conferencing to call on the group in real-time. Virtual learning technology allows faculty to assign instant breakout groups during a larger session. Share experiences, exchange ideas and collaborate to solve challenges with your fellow participants.

Self-Assessments: Individual assessment tools enable deeper self-awareness, encouraging participants to reflect on their learning journey throughout the program. Apply valuable new personal discoveries to your constantly evolving identity as a leader.

Simulations: Simulations teach the application of concepts in critical decision-making moments, requiring participants to apply leadership skills and navigate team dynamics – just like in real life. These simulations are supported by computer modelling with fully integrated, digital-first delivery. You'll play out complex scenarios on accelerated timelines, choosing to follow or ignore new data, information, and advice. Following the simulation, join our faculty for a synthesis of ideas and concepts, working in concert with other leaders to find actionable takeaways for your organization.



EXPLANATION FOR CASE METHOD

Case method learning is based in experiential learning, inserting the participant into real scenarios faced by professionals in the field; participants navigate the situations themselves, share perspectives with peers and walk away with transferable insights they can take into their own organizations.

CASE STUDY EXAMPLE

Step into the role of Senior Vice President for the Research and Planning group of Metrobank and tackle the question: how do you plan goal-setting and performance improvement?

Through analyzing the numbers and interviewing key stakeholders in the company to gain insights, you will determine what pain points are causing high employee turnover, poor cost control and inconsistent production standards and plan how to pivot the organization's strategy.

In this case learning experience, we bring the learning to life with live actor role-play sessions, peer discussions and faculty debriefing. Learn to build commitment through participation, communicate clear shared goals across an organization, and help direct reports understand their contributions to a larger strategy.



FACULTY

Martha Maznevski, Professor of Organizational Behaviour, Faculty Co-Director of the Ivey Academy; Expertise in Leadership & Teams, Disruption, Diversity & Inclusion, Digital Transformation, and Experiential Learning

Tima Bansal, Professor of Strategy, Director of Ivey's Centre for Building Sustainable Value and Executive Director (and Founder) of the Network for Business Sustainability

Mehmet A. Begen, Professor of Management Science, Certified Analytics Professional; Expertise in Statistical & Actuarial Sciences, Epidemiology, Data Driven Approaches, and Biostatistics

Ann Frost, Professor of Organizational Behaviour & Industrial Relations; Expertise in High Performance Work Practices, Changing Union-Management Relations, and Interpersonal Negotiations

Kanina Blanchard, Professor of Management Communications & General Management; Expertise in Public Affairs & Public Policy, Crisis & Issues Management, and Responsible Leadership

Greg Zaric, Professor of Management Science, Epidemiology, & Biostatistics, Faculty Director of both the Ivey MSc and MMA Programs, Editor-in-Chief of the Health Care Management Science Journal

David Loree, Professor of Organizational Behavior, Faculty Co-Director of the Ivey Academy & Program Director of the Ivey Leadership Program; Expertise in Leadership & Strategy, Organizational Change, and Talent Development

Fernando Olivera, Professor of Organizational Behaviour; Expertise in Organizational Learning, Knowledge Management, Interpersonal Negotiations, and Conflict Resolution

Laurel Austin, Professor of Management Science; Expertise in Behavioural Economics, Risk Management & Communication, Decision Analysis, and Consumer Insurance Behaviour

Mazi Raz, Professor of General Management, Director of Learning Design & Strategy at the Ivey Academy; Expertise in Strategic Foresight, Leadership, and Management Thinkways & Creativity

Rob Austin, Professor of Innovation and Information Systems, Affiliated faculty member at Harvard Medical School and Aarhus School of Business and Social Sciences

Fredrick Odegaard, Professor of Management Science; Expertise in Decision-Making with Analytics, Revenue Management, Big Data Analysis, and eCommerce/IT Applications



FAQ

1. How much preparation do I need to do before the course starts?

Preparation time depends on the program itself. In order to maximize the value of your time in class, often self-assessments, case notes, self-reflection activities will need to be completed ahead of the virtual sessions. You should be ready to do 1-2 hours of preparation as required for the program/session.

2. What is the time commitment?

The different program offerings range in time commitment, so depending on your course(s) of choice, you should prepare for 20-30 class hours spread between 3-8 weeks.

3. To complete a course do I need to do a final exam?

Courses are designed with practical application in mind. Instead of tests or exams, learning is planned around hands-on experiences like simulations and actor role-play. With frameworks and sustainment tools from Ivey, your outcomes are then measured in terms of real-world impact and change – in your role and for your organization.

4. If I can't attend the course on the date it is scheduled to begin, will there be future course offered?

Yes, future courses will be offered. Visit our page to see the upcoming courses. If you would like to be notified when the next course is open for registration please email pdevents@cpaontario.ca with your name and email and request to be on the notification list for the next certificate.

5. How do I register for the courses?

You can register for the course through our PD portal. After you have registered through the CPA Ontario PD Portal and prior to the start of the course you will receive an email from the Ivey Academy at Ivey Business School welcoming you to the program and providing you with information on how to log in and access your program materials. You must follow the instructions in this email to access and participate in the program.

6. Are there payment options?

There are no payment options available currently. Full payment is required at time of registration.

7. If I am not a CPA can I still take the courses?

Yes. The course is designed for specifically for CPAs but is relevant for other financial professionals who want to enhance their leadership capabilities.

8. Is there homework that needs to be completed outside of the live sessions?

Yes. Each course includes both in-class sessions, as well as pre-work to complete in advance.

9. If I am away for a live session will it be recorded?

Yes. All the live virtual sessions will be recorded. However, this is a highly interactive course and missing the live virtual sessions may result in not getting the most out of the course. If you need to miss a live session, speak with your instructor about how to keep up with the course.

10. Is there any prerequisite knowledge I need to successfully complete these courses?

Beyond the common understanding of business principles and familiarity with how organizations function, no specific knowledge or technical skill is required to benefit from the course. In general, the key to success to all individual courses is a combination of genuine curiosity for learning, preparation of the course materials (reading the cases, etc.), and thoughtful engagement in learning activities.

11. What happens if I can't attend the course after I register for it?

You may cancel your registration and receive a full refund up to seven (7) days in advance of the start of the program. Cancellations within seven (7) days of the program start date, or after the program has started, will incur a withdrawal service charge. Registration, cancellation, withdrawal and all other CPA Ontario PD Seminar policies [can be found here](#). For greater clarity, the provisions herein, including this Cancellation Policy, take precedence in the event of a conflict over other provisions in CPA Ontario PD Seminar policies.

12. If I have more questions, who can I reach out?

For any questions, please contact CPA Ontario at pdevents@cpaontario.ca.

