



# AFOA CANADA

*Building a Community of Professionals*

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## Special Arrangement B Application

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**The Certified Aboriginal Financial Manager (CAFM) designation** is the preferred credential for Aboriginal finance and management positions in Canada. As a CAFM, you have a wide range of available career opportunities. The CAFM designation identifies you as a highly qualified financial management professional in tune with the challenges facing today's Aboriginal organizations. They want – and need – financial managers with clearly defined and well-developed competencies. They want and need CAFMs.

**A CAFM designation demonstrates** that you are up-to-date on the latest Aboriginal financial management practices, that you follow Professional Standards of Conduct, and that you are a leader in your community.

**The CAFM designation** is the mark of professionalism among Canada's Aboriginal financial managers. It is one of the preferred credentials for Aboriginal financial management positions. It means that you have a competitive edge over others in your field.

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## Special Arrangement B Criteria

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**For AFOA members with more than 5 years Practical Work Experience (PWE) in Aboriginal financial management:**

- Have the pre-requisite courses:
  - CAFM 4 – Strategy & Decisions
  - CAFM 14 – Aboriginal Human & Fiscal Issues
- Meet the five years Practical Work Experience requirement in Aboriginal Financial Management.

**If you meet, or exceed, the above criteria, please proceed with completing the CAFM Application in its' entirety.**



Certified Aboriginal Financial Manager (CAFM)  
Special Arrangement B Application Package

**Section A – Identification**

<b>Name:</b>		<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	<input type="checkbox"/> Mrs	<input type="checkbox"/> Designation _____
<b>Home Address:</b>		<b>City:</b>		<b>Prov</b>	<b>PC</b>
Home Phone: (    )	Cell: (    )	Hm E-Mail:			
<b>Organization Name:</b>		<b>Position:</b>			
<b>Organization Address:</b>		<b>City:</b>		<b>Prov</b>	<b>PC</b>
Work Phone: (    )	Work Fax: (    )	Wk E-Mail:			
<input type="checkbox"/> AFOA Member		<input type="checkbox"/> Non-member, <i>include a completed membership application form along with fees</i>			

**Special Arrangement B Checklist - \$200 plus GST/HST**

For AFOA members with more than 5 years PWE in Aboriginal financial management. Please include and complete:

*(Please submit your documents in the order listed below, single sided and do not staple)*

- Signed letter to challenge the CAFM Professional Examination.
- Successful completion of the two courses with a minimum grade of 65%:
  - CAFM 4 – Strategy & Decisions
  - CAFM 14 – Aboriginal Human & Fiscal Issues
- Section A – Identification
- Section B – Record of Practical Work Experience, and
  - Resume
  - Job Description
- Section C:
  - Letter of reference from Sponsor 1
  - Letter of reference from Sponsor 2
- Section D – Competency Standards
- Section E – Fees of \$200 plus GST/HST

I certify that the information set out by me in this document is true and correct to the best of my knowledge. I have reviewed and I adhere to the CAFM Standards of Ethical Conduct as set out by AFOA Canada, I understand that the persons and organizations on this application may be contacted and I authorize the release of information for the purpose of the application.

I understand that once certified, CAFMs pay an additional fee as part of their annual membership renewal. This fee supports the cost of CAFM professional development opportunities, the certification and enhancements of the CAFM designation.

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Date



**Section B – Record of Practical Work Experience**

The Certified Aboriginal Financial Manager (CAFM) Practical Work Experience (PWE) requirement is a minimum of five years PWE gained in an Aboriginal financial management environment verified by two sponsors. The purpose of the requirement is to provide assurance that a CAFM possesses competencies in Aboriginal financial management. The CAFM Competency Standards (see *Section D*, pages 4 to 8) in Aboriginal financial management are measured through your practical work experience and passing the examination.

Record your PWE in Aboriginal financial management below as it **relates to the CAFM Competency Standards**. Your PWE presented will be compared to the attached Competency Standards (Section D) by your sponsors (see Section C for Sponsors). Please attach additional sheets if necessary.

**Applicant Name:** \_\_\_\_\_

- Please attach:**
- Comprehensive résumé **AND**
  - Relevant job description(s)  
Or 'Statement of Work'

*If your resume AND job description(s) are not attached, your application IS NOT complete*

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<b>Employer:</b>	# of years _____ months _____
Employer Contact Information:	
Applicants Job Title with above Employer:	
Dates Position Held <b>from</b> _____ / _____ / _____ <b>to</b> _____ / _____ / _____ (YYYY/MM/DD)	

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<b>Employer:</b>	# of years _____ months _____
Employer Contact Information:	
Applicants Job Title with above Employer:	
Dates Position Held <b>from</b> _____ / _____ / _____ <b>to</b> _____ / _____ / _____ (YYYY/MM/DD)	

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<b>Employer:</b>	# of years _____ months _____
Employer Contact Information:	
Applicants Job Title with above Employer:	
Dates Position Held <b>from</b> _____ / _____ / _____ <b>to</b> _____ / _____ / _____ (YYYY/MM/DD)	



## Section C – Sponsors

*Sponsors preferably hold the CAFM designation and are AFOA members. One of two sponsors must work in an Aboriginal organization and the two sponsors **must not** be from the same organization. It is preferable that one of your sponsors be a member of AFOA Canada or hold the CAFM Designation. Other acceptable sponsors may be your supervisor; a CPA; etc.*

*If sponsors believe you have demonstrated a minimum of 65% of the CAFM Competencies in Aboriginal financial management please have them confirm by providing you with a letter of reference which will attest to your skills and abilities as they pertain to the CAFM competency standards. Sponsors may be contacted to verify authenticity of the application.*

### Sponsor # 1 Attach letter of reference from Sponsor AND include excerpt below:

“I have reviewed the recorded practical work experience and competencies and recommend this individual be considered for approval as a Certified Aboriginal Financial Manager. To the best of my knowledge, he/she adheres to the AFOA Standards of Ethical Conduct, has good moral character, and has not violated accepted standards of ethical behaviour.”

LAST NAME:	FIRST NAME:	<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	<input type="checkbox"/> Mrs	
Title:		Designation(s) held:			
Organization:					
AFOA Member:	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Certified Member of AFOA?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Relationship to Applicant:		Length of Relationship:			
Phone Number:	HOME (    )	BUSINESS <input type="checkbox"/>	(    )		

### Sponsor # 2 Attach letter of reference from Sponsor AND include excerpt below:

“I have reviewed the recorded practical work experience and competencies and recommend this individual be considered for approval as a Certified Aboriginal Financial Manager. To the best of my knowledge, he/she adheres to the AFOA Standards of Ethical Conduct, has good moral character, and has not violated accepted standards of ethical behaviour.”

LAST NAME:	FIRST NAME:	<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	<input type="checkbox"/> Mrs	
Title:		Designation(s) held:			
Organization:					
AFOA Member:	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Certified Member of AFOA?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Relationship to Applicant:		Length of Relationship:			
Phone Number:	HOME (    )	BUSINESS <input type="checkbox"/>	(    )		



## Section D – CAFM Competency Standards

Competencies have been grouped into the following core domains and sub-domains of knowledge and skills:

### 1. Technical Knowledge

- T1. Financial Accounting & Reporting
- T2. Management Accounting & Performance Measurement
- T3. Finance & Financial Planning
- T4. Management Information Systems
- T5. Taxation

### 2. General Management

- G1. Planning
- G2. Human Resource Management
- G3. Allocating and Managing Resources
- G4. Communicating
- G5. Aboriginal History and Culture

### 3. Leadership

- L1. Organizational and Strategic Leadership
- L2. Team Leadership and Development
- L3. Staff Coaching and Training

### 4. Professionalism

- P1. Ethics and Trust
- P2. Integrative Approach
- P3. Problem Solving
- P4. Professional Development
- P5. Professional Self Evaluation

**Details - Please review the competencies below and date and sign the last page of Section D.**

### 1) Technical Knowledge

T1 – Financial Accounting & Reporting	
<ul style="list-style-type: none"> <li>1.1 Processes financial transactions in accordance with accepted accounting concepts, principles, and standards</li> <li>1.2 Recognizes what accounting treatments are required for community operations</li> <li>1.3 Provides advice on the organization’s accountability with regard to reporting obligations to communities, governing bodies, and regulatory agencies</li> <li>1.4 Ensures the reliability of financial information</li> <li>1.5 Documents, verifies, and maintains supporting information for transactions and events</li> <li>1.6 Prepares financial statements and financial information appropriate for users</li> <li>1.7 Prepares, analyzes, and comments on financial performance</li> </ul>	<ul style="list-style-type: none"> <li>1.8 Develops, adapts, evaluates, administers, and advises on accounting policies and procedures in accordance with professional standards and recognizing needs of stakeholders</li> <li>1.9 Designs appropriate financial accounting systems</li> <li>1.10 Evaluates, advises on, and adapts financial accounting systems in response to current and emerging developments</li> <li>1.11 Evaluates the organization’s assurance needs</li> <li>1.12 Analyzes and recommends the financial engagement letter for acceptance</li> <li>1.13 Evaluates internal control systems</li> </ul>
T2 - Management Accounting & Performance Measurement	
<ul style="list-style-type: none"> <li>2.1 Assesses performance measurement requirements in the context of organizational/community objectives</li> <li>2.2 Establishes a performance measurement system that links performance to strategic goals and objectives</li> <li>2.3 Evaluates organizational activities against benchmarks as a means of planning further action</li> <li>2.4 Adapts performance measures for the organization based on benchmarking, best practices, and performance indicators</li> <li>2.5 Recommends changes to performance measurement system as required</li> </ul>	<ul style="list-style-type: none"> <li>2.6 Monitors quality and continuous improvement in accordance with organizational policies and procedures and community expectations</li> <li>2.7 Creates special-purpose reports to assist in the decision-making process.</li> <li>2.8 Implements methods to enhance the effectiveness of performance measures and standards</li> <li>2.9 Implements performance measures and standards</li> <li>2.10 Evaluates the effects of change on the organization</li> </ul>



**1) Technical Knowledge Continued**

<b>T3 – Financial Accounting &amp; Reporting</b>	
3.1 Develops and administers budgets and provides advice and assistance to managers preparing budgets 3.2 Develops financial forecasts and plans 3.3 Manages cash flow and working capital 3.4 Analyzes instruments to evaluate financial risk/return 3.5 Provides advice on various aspects of financing to meet the needs of the organization and the community 3.6 Provides advice on the capital structure of the organization	3.7 Determines financial implications of implementing operational strategies 3.8 Evaluates and develops business cases and/or financial proposals 3.9 Identifies financial risks and challenges 3.10 Identifies financial benchmarks 3.11 Develops and monitors financial risk management strategy 3.12 Employs general business practices to support Community Economic Development initiatives
<b>T4 - Management Accounting</b>	
4.1 Monitors the effectiveness of the MIS in relation to the organization’s business plan 4.2 Assesses the organization’s MIS needs to meet financial data processing, control, and reporting requirements 4.3 Advises on the design, development, and implementation of MIS projects 4.4 Uses technological tools in the workplace 4.5 Develops and evaluates financial system platforms	4.6 Assesses the impact of new technology on the organization 4.7 Evaluates the financial implications of new MIS acquisitions 4.8 Assists in the development of a corporate IT strategy 4.9 Evaluates MIS system security and controls to ensure business stability 4.10 Assists in the development of an IT disaster recovery plan
<b>T5 - Taxation</b>	
5.1 Determines taxpayer’s tax liability 5.2 Evaluates tax implications of First Nations and the Canadian Tax system	5.3 Applies the taxation rules applicable to First Nations people in determining taxation requirements. 5.4 Ensures compliance with all taxation reporting and filing requirements

**2) General Management**

<b>G1 – Planning</b>	
6.1 Contributes to the organization’s strategic planning initiatives 6.2 Explains, interprets, and applies the organization’s mission and vision statement to the organization/community 6.3 Aligns the organization’s resources to ensure accomplishment of the strategic plan 6.4 Together with management, performs a SWOT analysis with regard to the organization’s operational processes	6.5 Prepares, analyzes, and advises on strategic information to develop an organization’s operational plan 6.6 Assists with the communication of the organization’s operational plan to appropriate stakeholders 6.7 Identifies key steps, milestones, and critical systems that are needed for the success of changes to business activities, processes, and operational plans



**2) General Management Continued**

<b>G2 – Human Resource Management</b>	
<p>7.1 Manages human resources with regard to hiring, training, and providing job descriptions</p> <p>7.2 Evaluates staff performance against previously identified benchmarks</p> <p>7.3 Employs strategies to manage stress during difficult situations</p>	<p>7.4 Evaluates the impact of decisions with respect to Federal and Provincial/Territorial Legislation</p> <p>7.5 Ensures that compensation is in compliance with both legal requirements and organizational goals and objectives</p> <p>7.6 Contributes to the development of Human Resource Policies and Procedures</p>
<b>G3 – Allocating and Managing Resources</b>	
<p>8.1 Evaluates the organization’s access to required financial resources</p> <p>8.2 Plans for financial resource allocation</p>	<p>8.3 Assesses the impact of new technology on the organization</p>
<b>G4 – Communicating</b>	
<p>9.1 Communicates information clearly and concisely in oral and written formats</p> <p>9.2 Provides timely information to appropriate stakeholders</p> <p>9.3 Chooses an appropriate medium to convey information, ideas, and results</p> <p>9.4 Produces a variety of specific-purpose reports in a professional format</p> <p>9.5 Uses appropriate listening, clarification, and follow-up techniques within the organization and the community requirements</p>	<p>9.6 Facilitates the resolution of conflicts and disputes</p> <p>9.7 Develops and maintains positive networks and relationships with work-related groups and individuals</p> <p>9.8 Structures external communications in accordance with a communications strategy</p> <p>9.9 Demonstrates diplomacy, discretion, and confidentiality in dealing with organizational or client information and data</p>
<b>G5 – Aboriginal History and Culture</b>	
<p>10.1 Provides advice based on an understanding of traditional Aboriginal community structures, functioning, and relationships</p> <p>10.2 Develops financial practices, policies, and procedures giving consideration to the different types, goals, political activities, and issues surrounding contemporary Aboriginal organizations</p>	<p>10.3 Evaluates the impact of programs and social policies used by the Government of Canada on Aboriginal community life in designing solutions to problems and issues</p>



### 3) Leadership

<b>L1 – Organizational and Strategic Leadership</b>	
11.1 Assumes leadership responsibilities as required 11.2 Develops strategic alliances and partnerships	11.3 Implements and manages change in the organization
<b>L2 – Team Leadership and Development</b>	
12.1 Leads team members in the achievement of organizational goals and objectives 12.2 Builds and motivates high-performance teams 12.3 Distributes work load while maximizing individual strengths and providing learning opportunities for team members	12.4 Invites input and feedback from the team 12.5 Monitors the needs for changes to operational procedures
<b>L3 – Staff Coaching and Training</b>	
13.1 Provides guidance, direction, and motivation to staff 13.2 Provides coaching, mentoring, and training to help prepare staff for future opportunities in the organization	13.3 Encourages staff contribution of ideas 13.4 Supports the evaluation of performance to maintain and improve work standards

### 4) Professionalism

<b>P1 – Ethics and Trust</b>	
14.1 Applies professional ethical standards in business and personal life 14.2 Exercises a consistently high level of professional judgment 14.3 Protects the organizational/community cultural values and interests 14.4 Exercises due diligence	14.5 Provides advice on the organization’s privacy policies 14.6 Demonstrates professional courtesy 14.7 Deals with situations in ways that enhance the reputation of the profession 14.8 Consistently meets or exceeds community/organizational expectations
<b>P2 – Integrative Approach</b>	
15.1 Compiles information from a variety of sources in dealing with complex issues 15.2 Uses creative and innovative approaches to build relationships within the organization and the broader community	15.3 Evaluates the impact of decisions on the organization as a whole 15.4 Compiles technical knowledge from a variety of sources in creating integrative solutions to problems





#### 4) Professionalism Continued

<b>P3 – Problem Solving</b>	
16.1 Uses a systematic approach to problem solving from problem identification to solution and reporting	16.5 Forms a sound basis for decision making by assembling findings and conclusions
16.2 Defines the nature and scope of the problem	16.6 Evaluates alternatives in order to form recommendations
16.3 Evaluates information from a variety of sources in the problem-solving process	16.7 Makes decisions through a consultation process to build consensus
16.4 Analyzes data for patterns, relationships, and trends	

  

<b>P4 – Professional Development</b>	
17.1 Engages in continuous learning and career management planning in order to develop as a professional	17.4 Applies new learning to operational activities
17.2 Maintains currency with regard to financial and non-financial knowledge and skills	17.5 Demonstrates organization and time management skills in order to achieve professional goals
17.3 Uses professional networks as a means of better serving the community and/or organization	17.6 Recognizes the need for personal professional development

  

<b>P5 – Professional Self Evaluation</b>	
18.1 Acts within the scope of professional competence	18.3 Anticipates problems and maintains an open mind with regard to creative solutions
18.2 Defers to appropriate professionals when personal or organizational limits are exceeded	18.4 Evaluates own professionalism

**I have read and understand that the above competencies are what are required of a CAFM, and that I attest that I have demonstrated at least 65% of the competencies.**

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Date



Section E – Fees

CAFM Application Fee:

- 1. All payments are to be made to: AFOA Canada
1066 Somerset Street West, Suite 301
Ottawa, Ontario K1Y 4T3
2. Application Processing Fees for CAFM applications will not be refunded.
3. If applying for AFOA Membership at the same time as applying for the CAFM Designation, applicants may send one cheque for both the membership dues and the CAFM application fees.
4. Incomplete CAFM applications are valid for two years from the original application date.

Table with 2 columns: Fee Description and Amount. Rows include Special Arrangement B Application Fee (\$ 200.00), Plus GST/HST\*, and TOTAL AMOUNT DUE.

\*GST/HST Rates:

All other provinces ..... 5% GST
NL, NB, ON ..... 13% HST
PE ..... 14% HST
NS..... 15% HST

Additional Fees:

Once your application has been reviewed and approved for exam eligibility, you will be notified by email to submit your CAFM Professional Examination registration. The CAFM Professional Examination fee is \$300 and this amount is paid separately.

Optional:

If you would like additional resources to prepare for the CAFM Examination, AFOA Canada offers a 3 – day CAFM Exam Preparation Session held in April, in Calgary and held in October, in Ottawa. If you are not able to attend the preparation session, you may order the Exam Preparation Binder on its' own.

- 1. Exam Preparation Binder \$300 plus applicable taxes
2. Exam Preparation Session \$900 plus applicable taxes (includes Exam Preparation Binder)

PAYMENT OPTIONS

I am paying by [ ] Cheque (payable to AFOA Canada) [ ] VISA [ ] MasterCard [ ] American Express
(Complete information below)

Credit Card Number: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Expiry: \_\_\_\_\_ / \_\_\_\_\_
mm / year

Cardholder Name: \_\_\_\_\_ Signature: \_\_\_\_\_
(please print)

Amount Authorized: \$ \_\_\_\_\_