



ASSOCIATION OF PROFESSIONAL EXECUTIVES
OF THE PUBLIC SERVICE OF CANADA

Annual Report

2019-2020



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Message from the APEX Chairman of the Board



For the past several years, we have been growing the APEX brand. You have responded by increasing the attendance at all our events: our symposium, our induction ceremony, our cafés, our webinars, our regional visits, and many others.

To ensure we continued to meet your needs, the Board focused on recruiting a new Chief Executive Officer (CEO) to replace Michel Vermette who retired in May. In June 2019, the Board was delighted to welcome Jacqueline Rigg as our new CEO. Jacqueline's experience in communications, outreach, finance and human resources in both the private and public sectors made her the ideal candidate. Jacqueline has made a difference already. She revised the mission and vision statements, strengthened our partnerships, recruited new team members, and travelled to many sites to visit with executives in the NCR and across Canada.

The Board has recently approved our new strategic plan. I encourage you to read it. Our four pillars are: advocacy, service excellence, national engagement and, business sustainability. We will continue to advocate on issues that matter most to you now and in the future, and our research will reinforce our advocacy. We will continue to provide our advisory services to ensure that our executives have confidential, personal support. Our engagements are focused on meeting you where you are – at your office in the NCR or regions, in person or virtually so that you get the information you need. And, we will do all this in a financially sustainable manner.

On a personal note, I decided to retire from the Public Service in May 2020. At my last board meeting in March we cancelled the APEX Symposium. While cancelling the event was the right thing to do, the need to support our executives in these challenging times is greater than ever. Jacqueline and her team are revising their outreach strategy to adapt to the new normal. I would like to thank the APEX team for all the work they do on behalf of the Board but more importantly for you – our executives. As these past weeks have shown, Canada's Public Service rises to the challenge. Our public service is the best in the world. Your leadership is what makes that possible.

Thank you. It's been very rewarding and a pleasure to have been the Chair of the Board of APEX.

Sincerely;

A handwritten signature in blue ink, which appears to read "M. J. Whittaker".

Michael J. Whittaker
Chair, Board of Directors

Message from the APEX Chief Executive Officer



Dear Members

I would like to thank you, the executive community, for your steadfast support that empowers us to succeed. It fuels our way forward and I am excited to be at the helm of APEX, blazing new paths while building on past successes.

I am honoured to champion our Vision of having “an executive community with elevated wellness, elite leaders, and extraordinary impacts through partnerships.” Our Vision is foundational to our Strategic Plan – “Delivering Community Value.” This is the blueprint that will guide the Association’s focus and activities over the next five years. Our path is set to deliver a new level of excellence.

Membership at APEX is investing in your excellence. We support you as an individual, as a community and we are your voice. We are building our research capacity, leveraging partnerships, developing centres of excellence in Health and Wellness, Leadership and Total Compensation. We are actively working to enrich your experience as an executive.

As we look to the future, especially during these challenging times, APEX is here for you. The call for you to demonstrate healthy and resilient leadership has never been greater. As Executives, your teams and organizations as well as your family, friends and communities, are counting on you. I believe that the best way for you to lead, is to take care of yourself. At APEX, we are committed to supporting you on this journey of wellness.

In closing, everything that we are doing at APEX, everything that your Department is doing, everything that you are doing personally should be to push your leadership to not only shine, but to go ‘super-nova’ with achievements.

Warmest regards,

A handwritten signature in blue ink, appearing to read 'JR', written in a fluid, cursive style.

Jacqueline Rigg
Chief Executive Officer

Introduction

Leadership excellence demands effort. APEX invests the time and effort so that executives can invest in themselves.

The Association of Professional Executives of the Public Service of Canada (APEX) has supported Federal Public Service executives since 1984. Over the years, we have learned that the environment in which executives are operating is constantly changing. As a result, executives are balancing changing priorities, diverse teams and new work concepts. In the Fall of 2019, APEX developed a new Vision, Mission, and Values to better support Executives. This led to the development of a new Strategic Plan – “Delivering Community Value”. The Plan, built on the rich APEX history, and empowered by partners and collaborators promotes enhanced support for executive leadership.

APEX Mission

We will be a vibrant national organization that inspires executive excellence in leadership through strategic advocacy, research, professional development and advisory services. We will be the preeminent voice for the executive community of the Public Service of Canada.

APEX Vision

An executive community with elevated wellness, elite leaders and extraordinary impacts through partnerships.

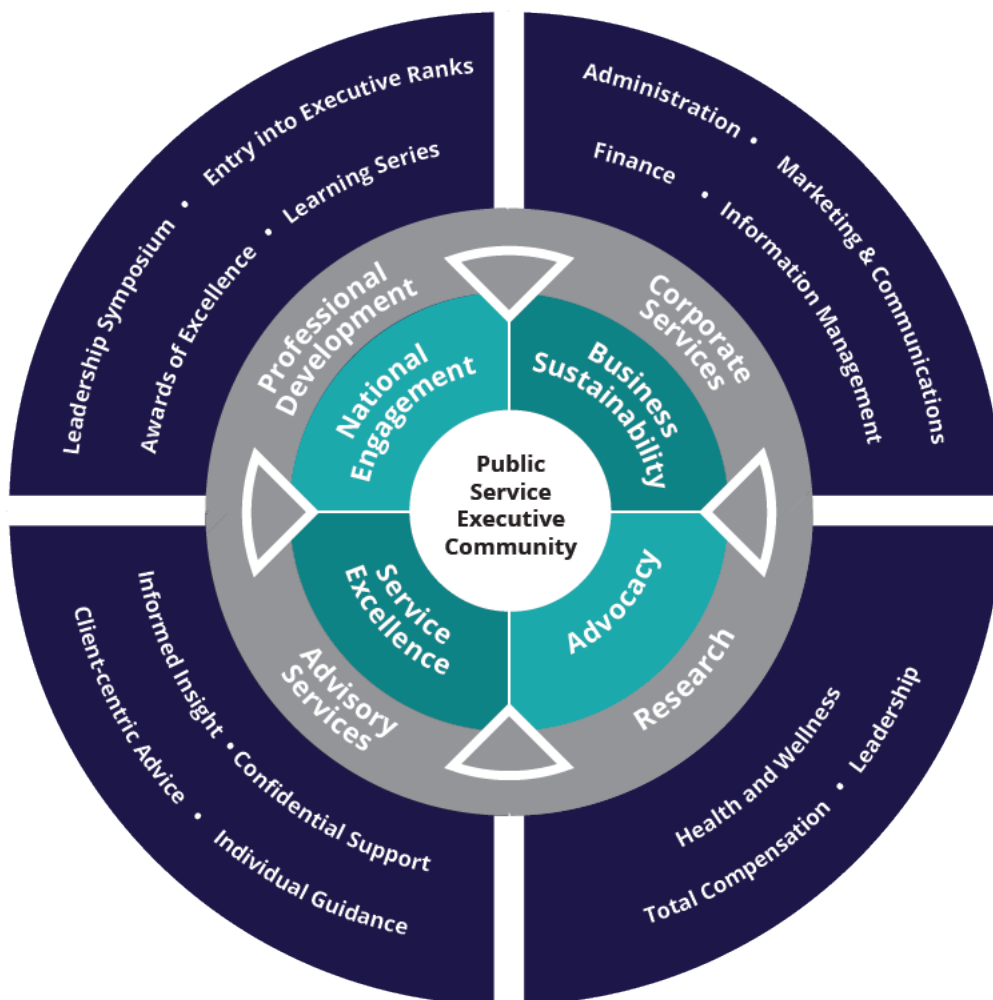
APEX Values

APEX is committed to professionalism, integrity, inclusivity, empathy, innovation, collaboration and a culture of trust.

Strategic Plan 2020-2025

The 2020-2025 Strategic Plan, “Delivering Community Value” will build on the successes of the past while recognizing our foundational strengths. Over the years, we have developed our capacity and have been recognized for advocacy, independent research, executive advice and information gathering. An executive-centered approach has allowed us to maintain a strong voice on a range of issues, that include executive wellness, performance management and total compensation.

This Plan provides an opportunity to re-set our research orientation with an emphasis on enhancing the breadth and depth of research undertaken to benefit the executive community. Leadership, health and wellness, and total compensation have been prioritized as Advanced Focus Areas (AFA’s), as they represent core and emerging research strengths through which APEX will contribute to discovery, new insights and creative work.



Corporate Services

Board of Directors

The APEX Board of Directors is comprised of fifteen members, including nine regular members from the National Capital Region, one regular member from each of the five regions and one associate member. Directors are elected by the members for a term of three years, commencing on the date of the Annual General Meeting and are eligible for one additional consecutive term of three years. The Executive Committee of the Board includes the Chair, Vice-Chair, Secretary, Treasurer and Officer-at-Large. The Board of Directors meets 6 to 8 times a year and plays a key role in setting the organization's strategic direction.



APEX Board of Directors (left to right): Geneviève Binet (NCR), Doug Zolinsky (Prairies), Emilio Franco (NCR), Michael Whittaker (NCR), Indira Persaud (Ontario), Lori Streefkerk (NCR), Joanne Larocque-Poirier (NCR), Piero Narducci (NCR), Bojana Zizic (NCR), Laurie Sargent (NCR), Daryell Nowlan (Atlantic) and Claire Caloren (Quebec and Nunavut). Missing: Sheriff Abdou (NCR), Angela Bate (BC and Yukon), Charlotte Stewart (Associate Member).

Annual General Meeting (AGM)

The APEX Annual General Meeting was held on October 1, 2019. Key agenda items included a presentation of the 2018-19 APEX Annual Report, the review of the Association's Audited Financial Statements, the election of new Directors and proposed By-law amendments dealing with Board governance.

A resolution to approve the Audited Financial Statements for the period ending March 31, 2019 was approved, as was a resolution to continue using the services of the audit firm Marcil-Lavallée for the 2019-2020 fiscal year. The slate of candidates to fill three vacancies on the Board of Directors was also approved, with Geneviève Binet, Canada Border Services Agency (NCR), Claire Caloren, Employment and Social Development Canada (Quebec/Nunavut Region) and Joanne Larocque-Poirier, Canada Council for the Arts (NCR) joining the Board.

Finally, proposed by-law amendments dealing with recommended improvements to the governance of the Association with respect to organizational continuity and succession management were presented, discussed and passed.

Business Sustainability

APEX continues to value the support it receives from the Deputy Minister and Deputy Head community, including their engagement in our work and their support of attendance at events such as the Leadership Symposium and Recognition of Entry to the Executive Ranks. Deputy Ministers and Deputy Heads also provide key support to the Association through their approval and support of the 5-Year Funding Plan and the funding of Interchange Agreements, which allow executives to join APEX for defined periods in order to lead key projects and initiatives in support of the executive community.

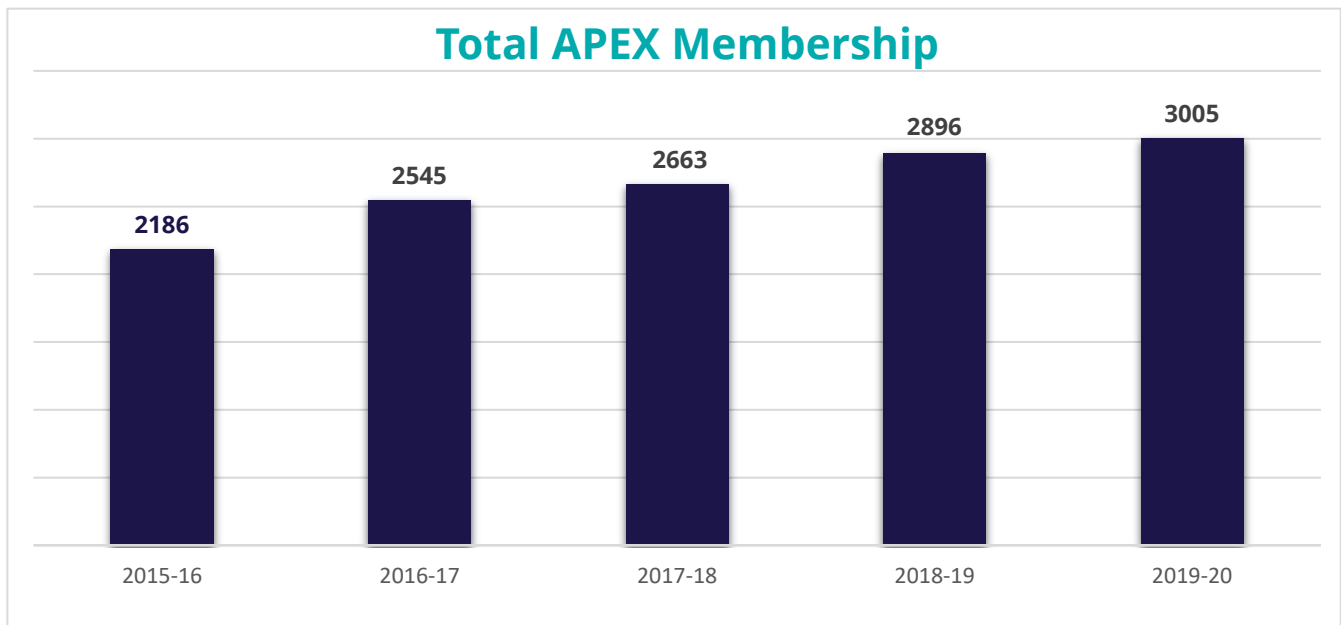
The Association also generates revenue through major annual events such as the Leadership Symposium, the Induction Ceremony for New Executives as well as other professional development activities. Membership fees and sponsorships also contribute to the funding required to support our operations. APEX is grateful for the generous support of its corporate sponsors in 2019-2020, including Sun Life Financial, Accenture, Desjardins-Caisse de l'administration et des services publics, PwC Canada, Mercer, the National Association of Federal Retirees, Nelligan O'Brien Payne LLP, Johnson Insurance, Raven Law LLP, Industrial Alliance, Deloitte, the Telfer Center for Executive Leadership and VIA Rail.

Our Membership

Recognizing the importance of membership care, APEX created a dedicated position to support APEX members – Member Care and Projects Coordinator. This function will enhance internal coordination for membership care including database management and program support for members. It will also enhance APEX’s capacity to communicate with and support individual members – including responding to inquiries and providing timely communication and outreach activities.

In 2019-20, APEX’s total membership represented approximately 41% of the executive community in the Federal Public Service. APEX membership consists of regular members, associate members who are former or retired public servants and new executives who have recently been appointed to executive positions. It also includes individuals from other occupational groups that are subject to the EX terms and conditions of employment. APEX membership includes executives located across Canada and internationally.

APEX continues to achieve year-over-year growth in the number of regular members, with a total of 1961 regular members as of March 31, 2020, our highest number ever (surpassing last year’s total of 1857). When all membership categories are combined: regular (1961), associate (256) and new executives (788) this figure totals 3005 members, compared to 2896 last year. Total APEX membership over the past 5 years is outlined in the table below.



Advisory Services for Executives

The Advisory Services for Executives (ASE) provides free confidential support to all public service executives across Canada and abroad. The service was initiated in 2003 with financial support from the Deputy Head community, and while independent, complements existing services provided through departmental Executives Services Groups, Ombudsmen and Informal Conflict Resolution Offices.

In 2019-20, over 460 executives contacted the advisory service (an increase of 13% from last year) to seek guidance and advice on workplace issues including mental health, career management and transition, relationships with supervisors and terms and conditions of employment. Among all clients, over 60% reported having health and mental health issues linked to their work situation.

As a result of the significant demand for advisory services, an additional resource was hired to address the increased workload. The major themes and issues impacting executives are shared broadly in outreach and are used in developing themes for APEX events and programming. They also inform the research agenda and the development of other APEX resources. The Advisory Services Annual Report highlights the work of the Advisors and the thematic trends identified. These reports are available on the [APEX website](#).



APEX Advisory Services has been a wonderful support to me.



Executive Wellness

The Executive Work and Health Survey has underlined that new executives have lower resiliency, higher burnout rates, and more mental health issues than other executives.

In order to address the unique challenges faced by new executives, APEX developed the New Executives Program – specifically designed to help new executives develop and to empower them at the beginning of their executive journey. This program is designed to provide support above and beyond departmental onboarding programs and provide networking opportunities to help new executives grow as individuals both within and as a community. APEX’s New Executives Program complements the Canada School of Public Service’s New Directors Program which APEX partners on by leading “The Health of Executives” component.

Programming specifically targeting new executives was developed and delivered, providing a safe space for learning and sharing of ideas, as well as the opportunity to build their own network. One session of the MindWell Leadership Program was offered exclusively to new executives and was well attended and well received. Building on that success, additional programming targeting new executives is being developed.

Another component of the New Executives Program is a mentoring program, which is being developed in collaboration with the Canada School of Public Service. This program will offer mentees the opportunity to work with a mentor in a small group setting on specific topics that are “pain points” for new executives. This short-term mentoring experience will help new executives avoid potential pitfalls going forward.

APEX will continue to develop and expand this new service offering to support new executives through their transition and to help them become competent and confident leaders.

Advocacy and Research

Terms and Conditions of Employment for Executives

Building on the work that was outlined in the 2018-19 Annual Report, APEX leveraged the information that was gathered from the executive community to advocate with the Office of the Chief Human Resources Officer (OCHRO) for specific improvements to executive policies as part of Phase I of their renewal of the Executive Policy Suite.

APEX conveyed the executive community concerns regarding terms and conditions of employment, talent and performance management. This representation by APEX resulted in improvements reflected in the changes to the Executive policy suite that took effect on April 1, 2020.

This advocacy was a first step in contributing to necessary policy change and APEX is actively advocating for ongoing improvements to the executive policy suite so that the next phase of renewal further reflects changes that respond to executive community concerns.

In addition to informing the Employer of needed improvements, APEX was frequently engaged to respond to questions and to explain executive terms and conditions of employment to various groups and organizations, including prospective executives convened by the Public Service Commission's Executive Counselling Services group and departments, professional communities and Regional Councils.

Tools and Information for the Executive Community

Respecting its longstanding focus on the development of reference materials of interest to executives, APEX continues to develop its repository of Guides and other reference material, while ensuring that existing tools and information are current.

Building on the successful launch and positive feedback from executives for the five Guides and ten Fact Sheets that APEX has published in the previous year, a Guide to Understanding and Navigating the Long-Term Disability (LTD) Plan for Executives was developed. This Guide is available to all executives.

To assist active and eligible former executives to claim their portion of the settlement for harm caused by the Phoenix Pay System, APEX worked closely with the Office of the Chief Human Resources Officer (OCHRO) to share information on the settlement and provide updates to the executive community on the status of retroactive salary payments.

In response to concerns raised by the executive community regarding both the performance management program and processes, APEX conducted a survey of all executives and channeled the findings into a perspective paper that was published and shared with the Office of the Chief Human Resources Officer (OCHRO) as input into the Executive Policy Suite renewal initiative. This paper highlighted challenges shared by executives regarding consistency, transparency, and equity in the application of the relevant directive provisions within and between departments.

Professional Development

APEX delivered a variety of professional development events targeting national and regional audiences. As a result of our outreach initiatives, we hosted more than 35 events for executives reaching a total of 3,125 participants. Additionally, we were invited to speak at a variety of departmental events including townhalls, and senior retreats augmenting the number of executives reached to close to 3,500.



Very good event. Appreciate having such a great session in the Region.

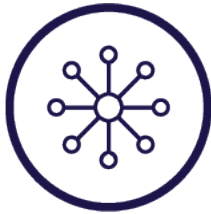
APEX Leadership Symposium

The 2019 APEX Leadership Symposium was a success with over 800 attendees. This event represents the largest in person gathering of public service leaders.

The 2019 APEX Leadership Symposium – Innovative, Global, Inclusive reached new heights. This is evidenced by the highest attendance in the history of our Symposium. The event was co-chaired by Christiane Fox, Deputy Minister, Intergovernmental Affairs and Youth, Privy Council Office and Chris Forbes, Deputy Minister, Agriculture and Agri-Food Canada. Participants included Deputies and all levels of the executive cadre as well as a number of additional occupational groups from a variety of Departments and Agencies. Approximately 93.2% of participants rated the Symposium as either good or excellent.

A link to the 2019 Symposium, including the program and list of speakers is available on the [APEX website](#).

2019 Leadership Symposium at a Glance:



11

Concurrent
Sessions



55

Speakers &
Moderators



71

Federal
Organizations



12

Keynote
Speakers



17

Sponsors



32

Exhibitors



823

Participants



Kudos to the organizing committee – best APEX Symposium I ever attended.



2019 APEX Awards of Excellence

The APEX Awards of Excellence provide a unique opportunity to nominate executive colleagues who have made significant contributions to the federal Public Service. The award categories are: Leadership Award; Career Contribution Award; Healthy Workplace Award; Partnership Award; Innovation Award; Community Contribution Award. In addition to these categories, there is also a Public Service Citation Award.

The Award segment included an address from Ian Shugart, the Clerk of the Privy Council. It was followed by a networking reception which provided an opportunity to connect with the incumbent APEX CEO Michel Vermette, incoming APEX CEO Jacqueline Rigg, the Clerk, Deputy Ministers, keynote and concurrent speakers and other participants.

Recognition of Entry to the Executive Ranks

APEX hosted 360 new executives at the annual 2019 Recognition of Entry to the Executive Ranks Ceremony. Held at the Canadian Museum of History in Gatineau, the program featured presentations by The Clerk of the Privy Council, Ian Shugart, the Chief Human Resources Officer, Nancy Chahwan, on the “Role of Executives in the Federal Public Service”, Dan Pontefract on More Than Leadership and included an “Ask a Deputy Minister” panel discussion.



In 2019, APEX also conducted its annual survey of new executives. Key questions centered around the reasons for wanting to become an Executive, the challenges facing the community, the developmental opportunities provided and their onboarding experience into the Executive ranks. In collaboration with the Canada School of Public Service, new questions were also included regarding learning support and what training would be most beneficial to new executives. The survey results were summarized in a report shared with the Clerk of the Privy Council, the Chief Human Resources Officer, the Canada School of Public Service and individual respondents. The findings were also shared with departmental Organization Representatives and Heads of Executive Services. This report is available on the [APEX website](#).

The Executive Insights Series

In 2019, APEX enhanced its delivery model and program design. In addition to lunch and learn events, APEX developed half-day programming as well as delivering a unique series, The Executive Insights Series tailored for senior executives at the EX-2 and EX-3 levels. To attend this Series, deputy ministers nominated executives from their respective organizations. The program was delivered in a three-part series to 90 executives. The full program and individual agendas for each session are available on the events page of the [APEX website](#).

APEX continues to leverage strong relationships with collaborators and partners to develop quality programming. In this context, APEX launched a new professional development series under 4 broad themes: Leadership, Public Policy Issues, Wellness and Inclusion. Guest speakers included Dan Pontefract, Dominique Dennerly, François Ducharme, the Ambassador for Climate Change Patricia Fuller and Canadian climatologist Dr. Gordon McBean. Our partners included Deloitte, and the Centre for International Governance Innovation.

Leadership Series	Public Policy Series
The Leadership Series brought new and emerging trends in leadership to the attention of executives from a variety of leadership experts, including the impact of leadership styles on mental health and how to adapt leadership in a constantly changing work environment.	The Public Policy Issues series enhanced the knowledge of executives on climate change as a priority of Government and provided insights for those working cross-departmentally on this complex, horizontal initiative.
Wellness Series	Inclusion Series
The Wellness Series provided a continued emphasis on executive wellness through the organization of events that provided practical advice on work-life balance, recognizing and adapting to different leadership styles, employing mindfulness techniques and becoming an influential leader.	The Inclusion Series brings to the forefront the benefits of recruiting, supporting and promoting a diverse work force. The Series challenges executives to be leaders in this area and to adopt and implement concrete actions and best practices to create safe, respectful and inclusive workplaces.



I really appreciated the presentation and have shared notes with colleagues already about leadership competencies.

Strategic Partnerships

Guided by its new Vision and Mission, APEX placed a renewed focus on partnerships. APEX and Deloitte collaborated once again to co-deliver the Executive Insights Series. The series was targeted to executives at the EX-02 and EX-03 levels. This was a tri-part series with the third session being delivered virtually as we adapted to the protocols associated with the pandemic. The three sessions: The Global Leader; The Inclusive Leader and The Wellness-Oriented Leader were well received with high review ratings. APEX also strengthened its partnership with the Centre for International Governance Innovation (CIGI) and held a half-day program on Climate Change in the Fall of 2019.

Finally, APEX continues to collaborate with its Affinity Program partners, offering benefits to APEX members through negotiated promotions and special offers on a variety of professional services. Through its ongoing recognition of the importance of strong partnerships and the value of collaboration, APEX has leveraged the strengths of existing and new relationships with public and private sector organizations to maximize attendance at its events and to provide executives with enhanced benefits.



Executive Insights Series, The Global Leader, (from left to right) Charles Perron, Deloitte, Anil Arora, Chief Statistician of Canada, Maria Pagliarello, APEX, The Honourable Pierre S. Pettigrew, Deloitte, Jacqueline Rigg, APEX. January 29, 2020, National Arts Centre

Mindful Leadership Program

APEX delivered the Mindful Leadership Program in collaboration with MindWell U, a 6-month training program to help executives become mindful leaders. The training provided a unique opportunity to develop personal and professional skills to help executives reduce stress, boost resilience, and develop a sustainable habit of mindfulness-in-action and a personal wellness plan. Sessions were held in early March with a total number of 80 attendees and included a dedicated session for new executives.

Expanded Community Outreach

This past year, APEX reached out to various communities of executives. The CEO addressed the community of tax professionals at the Canada Revenue Agency (CRA) Executive Forum, as well as the executives of the Communication Services Community under the leadership of the Privy Council Office. In addition, APEX led the development of Executive Day for the EX Financial Management Community, which was held in Fall 2019 during the Financial Management Institute Professional Development Week. The outreach to these three communities totaled 570 executives. APEX also engaged with executive communities from Agriculture and Agri-food Canada, the Canadian Food Inspection Agency, the RCMP and the Department of Justice through the hosting of APEX Cafés.

In response to overwhelming interest, and as part of its regional outreach, APEX brought the More Than Leadership Workshop to 175 executives on the east coast (Halifax), west coast (Vancouver) and Ontario (Toronto). Executives had the unique opportunity to listen to and engage with high-profile leadership speaker Dan Pontefract and to network with peers.

In April 2019, APEX presented, as part of the APEX Toolbox Series of Events, a number of sessions on the Phoenix Pay System. Topics included compensation and financial management best practices to help address pay problems for executives and their staff.

Overall, through its events and outreach activities, APEX was able to provide information and support to approximately 3,500 executives, who provided valuable feedback on the quality, design and relevance of APEX's new programming suite, and indicated their continued desire to stay informed on matters that affect their work and well-being.

As we look to the coming year with its many opportunities and challenges, serving our members and the executive community will continue to be of paramount importance on our journey of service excellence.



ASSOCIATION OF PROFESSIONAL EXECUTIVES
OF THE PUBLIC SERVICE OF CANADA

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