



*Working Together
as a unified voice*



GLOBAL ASSEMBLY

Briefing

Anthony Pugliese

GLOBAL ASSEMBLY

Registrations from 91 Affiliates, gathering 127 participants



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Program Highlights

- **Strategic Plan Update**
- **IPPF Evolution**
- **Future of CIA**
- **Conversations on:** *Advocacy; Academic/Student Programs; Revenue Share Opportunities; Membership; Research; Quality Assessments*
- **Beat the Box – Team Building Activity**
- **Networking**

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Polling Results



90% of delegates loved/liked the new *Standards* framework.

Polling Questions:

- Do you think the Proposed Purpose of Internal Auditing is an improvement from the current Mission and Definition? Love it, 43% / Like it, 40%
- Do you think the new Standard Domains clarify and simplify the organization of the *Standards*? Love it, 44% / Like it, 49%
- Do you think incorporating “recommended practices” and “demonstrating conformance” will help internal auditors in implementing the *Standards*? Love it, 26% / Like it, 53%
- Will organizing the *Standards* into these two domains help chief audit executives and internal auditors understand their responsibilities? Love it, 37% / Like it, 50%
- Do you support adding Application Standards, so the *Standards* remain timely and relevant? Love it, 43% / Like it, 37%

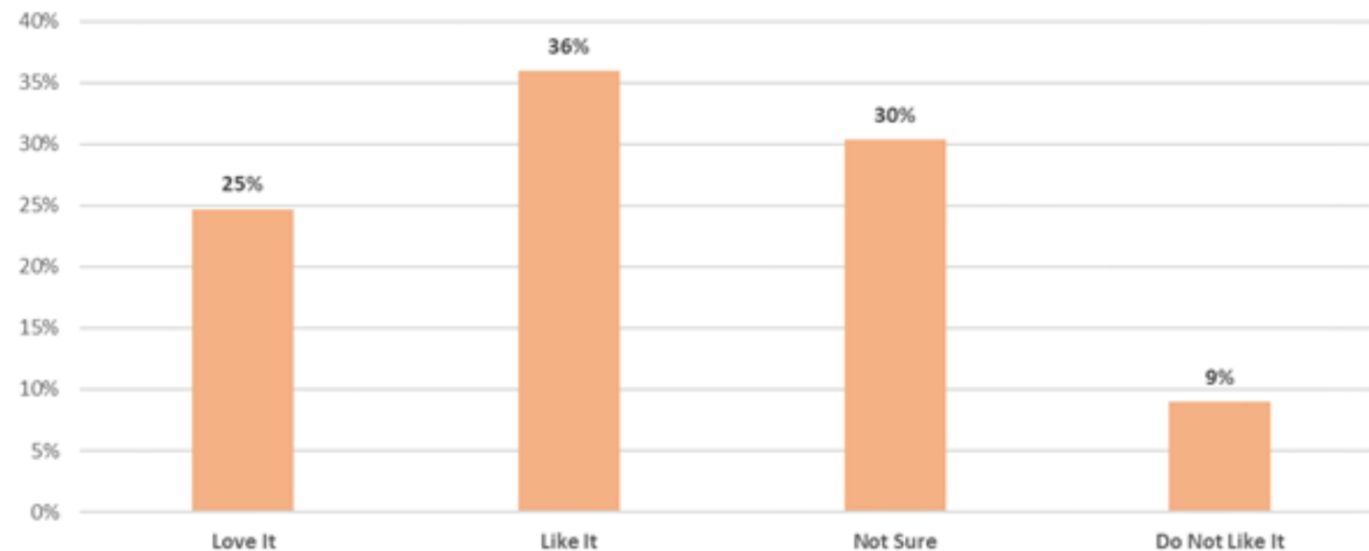
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IPPF EVOLUTION | Polling Results



30% of delegates were hesitant about using the term “mandate.” Many thought it did not translate well into other languages or that it needs further clarification about board roles.

Does the term “mandate” appropriately convey the meaning of “authority, role, and responsibilities” in your language and country?



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FUTURE OF CIA | Gathering Input



- Four different ideas about a future path for the CIA were presented for polling and discussion.
- The ideas were derived from a market study. *Please note that all ideas presented are not final.*
- Phase One of the market study included in-person interviews.
- Input was also collected at Global Assembly and International Conference.
- Phase Two will be launched soon with a global survey.
- The market study should conclude by June 2023.

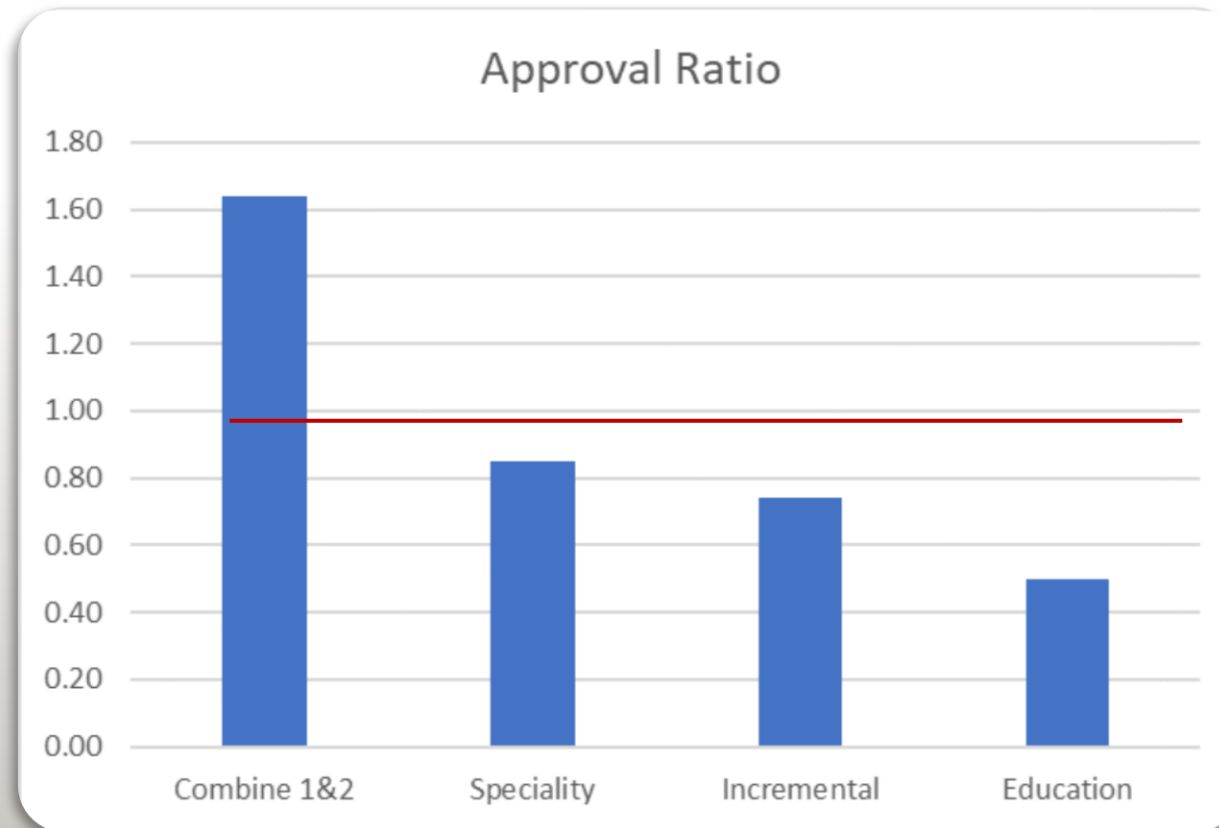
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FUTURE OF CIA | Polling Results



Delegates preferred the idea of combining Parts 1 and 2 over the other proposals.

Over 1.00 represents popular ideas.



Strategic Plan Update

Strategic Plan in Motion

AND GLOBAL IMPLEMENTATION



Reimagine and
Transform Our
Organization



Promote
Competency and
Learning



Grow Membership
and Models



Advocate for Public
Interests of the
Profession



Evolve and
Heighten Brand
Awareness



Enable the
Profession for the
Future

Strategic Plan in Motion

AND GLOBAL IMPLEMENTATION



Reimagine and Transform Our Organization

Promote Competency and Learning

Grow Membership and Models

Advocate for Public Interests of the Profession

Evolve and Heighten Brand Awareness

Enable the Profession for the Future

A. Reimagine the global operating model to ensure services are delivered globally, collaboratively, equitably, and sustainably for members and potential members around the world

E. Embrace sophisticated marketing tools and strategies to drive membership and product revenue

A. Reimagine professional development and credentialing

A. Grow student membership

A. Elevate global recognition of and respect for the internal audit profession, the *Standards*, and the CIA designation

A. Build awareness of The IIA and enhance services to board and management stakeholders

A. Reimagine the IPPF to advance the profession globally

B. Build and continuously evolve agile, secure, and scalable technologies

F. Cultivate a data-driven culture

B. Expand and deploy new global go-to-market strategies for education products

B. Expand membership reach to include industries adjacent to internal audit

B. Mobilize IIA staff and volunteers to advance advocacy efforts with consistent priorities and messaging

B. Reimagine and launch a new brand to elevate the impact of The IIA and reputation of the internal audit profession

B. Establish internal audit as a required governance component for all organizations

C. Reconfigure our organizational structure to support the strategic plan and enhance our culture

G. Protect our intellectual property

C. Elevate and enhance the member experience

C. Embrace our role as the preeminent provider of competency, learning, and assessment for the internal audit profession

C. Establish internal audit as a tech-savvy profession and desirable career choice

D. Establish best-in-class portfolio strategy process to enhance member value and drive sustainable revenue growth

H. Cultivate partnerships with like-minded organizations

D. Embrace principles of diversity, equity, and inclusion as an organization and as a profession

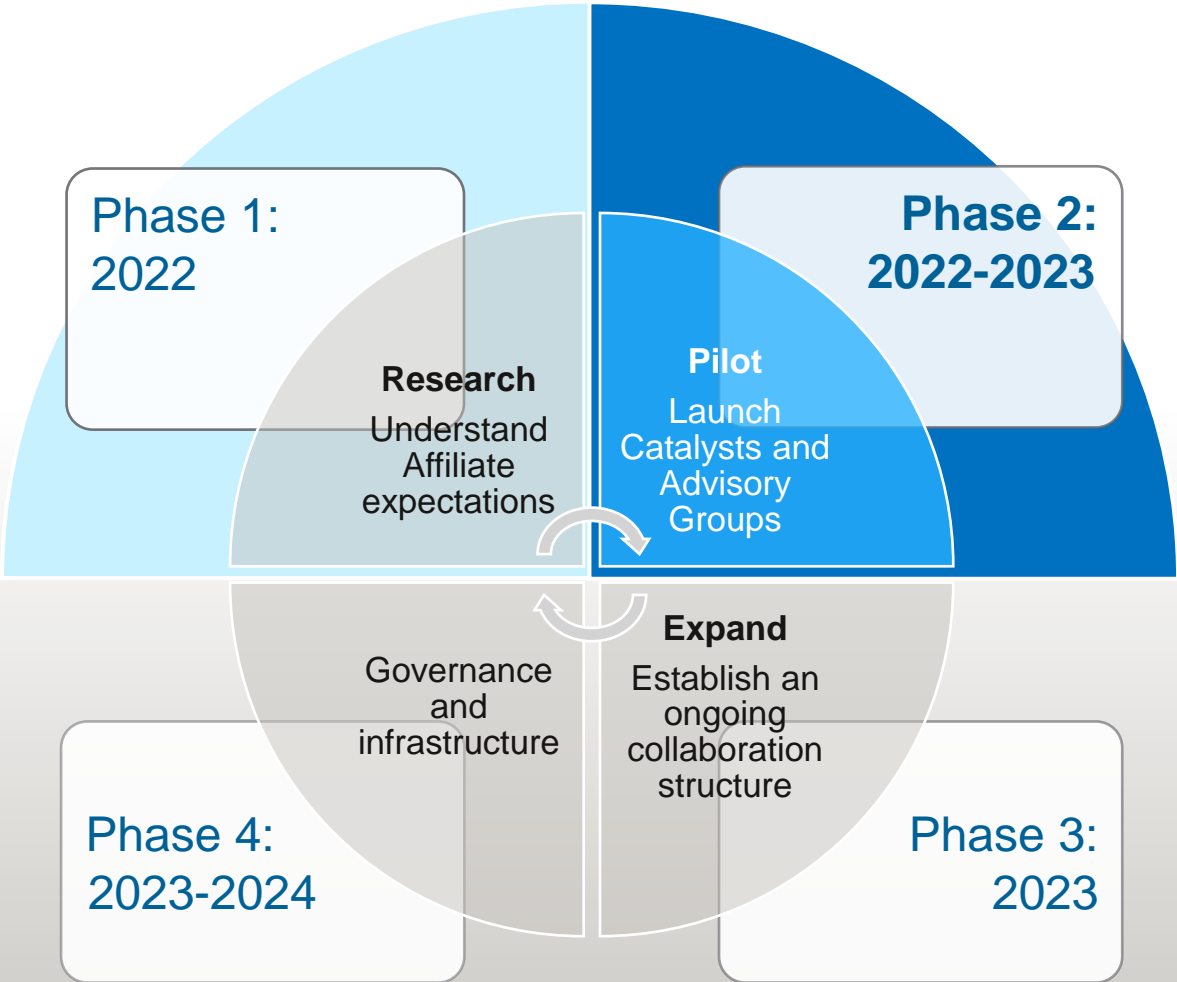
GLOBAL Operating Model

- Catalyst Groups -

Javier Faleato

GLOBAL Operating Model

- BUILDING TRUST -





116

LAUNCH CATALYST GROUPS

Catalyst Groups Snapshot:

45

Affiliates Represented



IIA SMEs from all business units

6

Catalyst Groups

4

Advisory Groups and Committees

QUALITY ASSESSMENTS

CERTIFICATES

GLOBAL EXECUTIVE MEMBERSHIP

BENCHMARKING

KNOWLEDGE SHARING

GLOBAL RESEARCH

ADVISORY GROUPS

QUALITY ASSESSMENTS

Purpose:

Elevate the profession by raising the quality of the internal audit function and generating a stronger culture of governance.



Identified Challenges:

- Lack of knowledge about IIA Quality Assessment services
- Shortage of assessors
- Minimal awareness of training opportunities



Identified Opportunities:

- Revenue share
- Advocacy partnerships

Catalyst groups will be tasked with exploring partnership models with IIA Global, identifying resources, and developing a new working model to support Affiliates.

CERTIFICATES

Purpose:

Provide members with career advancement opportunities.



Identified Challenges:

- Lack of knowledge about IIA Certificates
- Shortage of trainers



Identified Opportunities:

- Revenue share
- Diversified learning options

Catalyst groups will be tasked with assessing the current certificate landscape, identifying viability of certificates, and envisioning a strategy for certificate development and accessibility.

Catalyst groups will be divided initially by regions, then merged for collaboration opportunities.

Phase One – began with Global Awareness Webinars in August 2022

CERTIFICATES

2023 Certificates Being Developed

- ESG Certificate (Q1/Q2)
- Fraud Analytics Certificate (Q1/Q2)
- Auditing NIST Cybersecurity Program Certificate (Q1/Q2)
- Others – To Be Determined

YOUR IDEAS?

GLOBAL EXECUTIVE MEMBERSHIP

Purpose:

Empower CAEs with a membership program that responds to their professional needs.



Identified Opportunities:

- Global benchmarking and networking
- Revenue share

The catalyst group will be tasked with proposing benefits, assessing resources, and designing a short-term program to be launched in Q1 2023.

In its initial phase, the program will be launched in the Middle East and Latin America.

BENCHMARKING

Purpose:

Explore vehicles for members to obtain performance metrics and best practices to enhance their internal audit function.



Identified Opportunities:

- Global networking
- Knowledge sharing
- Expansion of global executive services

The catalyst group will be tasked with identifying benchmarking needs, exploring innovative benchmarking vehicles, and proposing short-term and long-term solutions.

KNOWLEDGE SHARING

Purpose:

Explore conduits to share content developed by IIA Affiliates.



Identified Opportunities:

- Global networking
- Effective collaboration
- Expanded global footprint

Catalyst group will be tasked with proposing guidelines to facilitate and enable sharing of global content.

GLOBAL RESEARCH

Purpose:

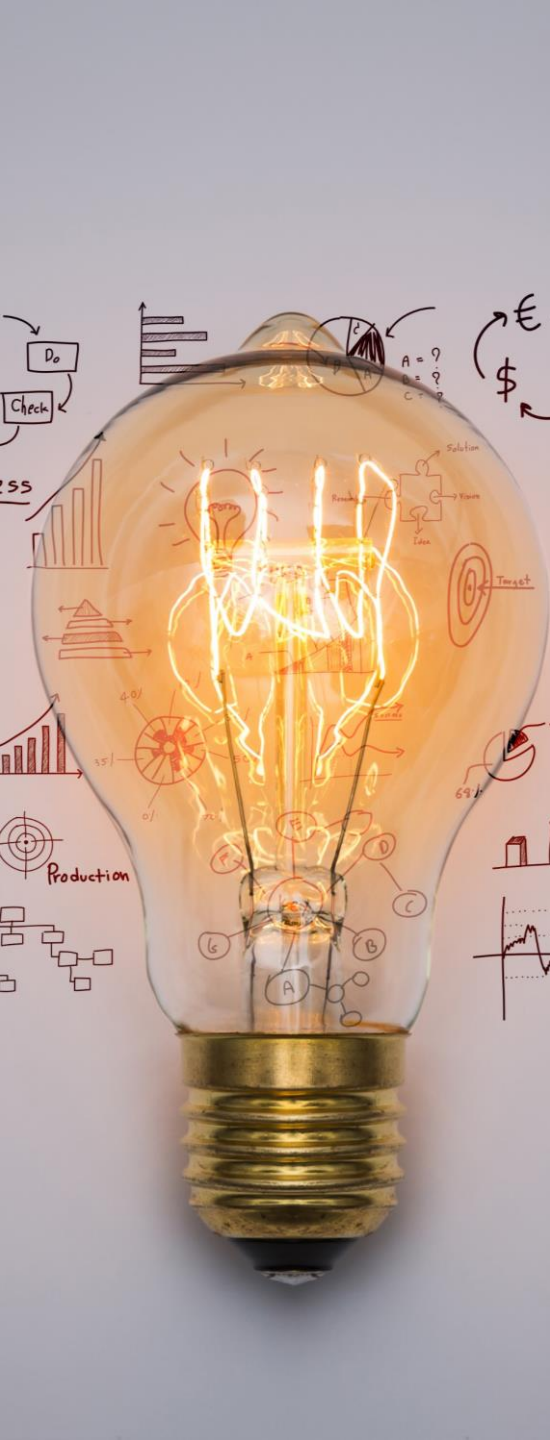
Identify opportunities to leverage Affiliate research, gain global insights, and avoid duplication of efforts.



Identified Opportunities:

- Effective collaboration
- Expanded global footprint
- Global knowledge

Catalyst group will gain an understanding of joint research potential, assess data collected by our network of Affiliates, and identify opportunities to publish collaborative reports.



YOUR INPUT

Do the Catalyst Groups cover your primary member needs?

Would you be willing to join a Catalyst Group?

ADVISORY GROUPS



ADVISORY GROUPS

In addition to the Catalyst Groups, a selected group of leaders will be invited to join an Advisory Group that will act as a sounding board to share perspectives, study issues, and provide input in a focused, small group structure.

Advisory Groups in Development:

- **Learning Portfolio and Content Development**
- **Ia Magazine**
- **Engagement and Communications (Through IRC)**
- **Certifications**
- **Advocacy (Advisory Committee for NA and Global)**

Current Advocacy Committees are being redesigned for strategic scope, global presence, and versatility.

TIMELINE



September

- Assemble Catalyst Groups
- Schedule first round of calls

October

- Groups to explore challenges and identify resources

November

- Develop working models

December

- Share working models with Affiliate network
- Establish processes
- Set launch date



Call for Volunteers
Influence, Innovate, and LEAD!

IIA

Call for Volunteers

14
October
2022
(Friday)

**Nominations for 2023–24
should be completed
and submitted electronically
by Friday.**

April
July
2023

**Those elected or appointed to
serve will begin their terms.**