



COUNCIL FOR CHIEF DATA AND ANALYTICS OFFICERS COUNCIL FOR INFORMATION TECHNOLOGY EXECUTIVES JOINT MEETING



Agenda

Theme: Optimizing the Partnership for Data Analytics and IT

FEBRUARY 21-22, 2018 – MONTREAL, QC

Meeting Location:

February 21:

Renaissance Montreal Downtown Hotel
1250 Blvd. Robert-Bourassa
Montreal, QC H2B 2B8

February 22:

Boardroom, Lobby Level
CN, Canadian National Railway Co.
935 de la Gauchetiere St. West
Montréal QC, H3B 2M9

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Accommodations:

Renaissance Montreal Downtown Hotel
1250 Blvd. Robert-Bourassa
Montreal, QC H2B 2B8

Meeting Objectives:

- Explore the challenges and best practices on how organizations are successfully incorporating new technologies into their strategy,
- Learn about Canadian organizations who, through people, processes and technology, are achieving the balance between becoming more data-driven and working within a business context,
- Gain a better understanding of how peers are building data ecosystems, and
- Network and engage in open and frank discussions with fellow peers about optimizing the relationship between analytics and IT in a trusted environment.

JOINT MEETING – CCDAO & CITE

Wednesday, February 21st, 2018

Council for Chief Data & Analytics Officers Meeting

Meeting Location: Renaissance Montreal Downtown Hotel, 1250 Blvd. Robert-Bourassa, Montréal QC, H3B 3B8 Room – Place-des-arts McGill

1:15 p.m. Day One Welcoming Remarks

**Andrew Pender, Associate Director, Privacy & Security
The Conference Board of Canada**

1:30 p.m. Member Spotlight: MD Financial Management

**Sean Follis, VP, Client Insight and Business Intelligence
MD Financial Management, CMA Companies**

In the 1950's, the Canadian Medical Association (CMA) recognized that many physicians were facing uncertain retirements because they lacked a structured investment and savings plan. The CMA lobbied the Canadian government to encourage Canadians to save for retirement. Before RRSP's, only individuals who were part of employer-sponsored registered pension plans could deduct pension contributions from taxable income. Thanks in large part to CMA's efforts, the Registered Retirement Savings Plan was born in 1957. Since then, the CMA's commitment to the financial well-being of physicians and their families has only grown. Today, the CMA's subsidiary, MD Financial Management (launched in 1969), administers more than \$47 billion.

Sean Follis has worked at MD Financial Management since 2009. Before becoming Vice-President of Client Insight and Business Intelligence, he led MD's new insight team as the Director responsible for managing individuals responsible for market research, data mining, and market measurement. He also led the insight team of multidisciplinary insight professionals with accountability for monitoring business results, member and market trends, and member feedback – synthesizing these inputs into business opportunities and threats for the enterprise to act upon. Previous positions include acting as a Research and Market Research Manager for MD Physician Services.

In this member spotlight session, Sean will explore how data analytics and IT are structured and organized at MD Financial Management, and what the key challenges and opportunities are.

2:30 p.m. Break

3:00 p.m. Facilitated Member Roundtable

CCDAO members will have the opportunity to discuss “hot topics” surrounding data analytics and IT partnerships, as well as challenges they have encountered and successes they have experienced. They will explore opportunities for how the data analytics and IT relationship can be better optimized.

4:30 p.m. Day One Closing Remarks and Adjournment

5:30 p.m. CCDAO Networking Dinner

**Bistro L’Aromate
980 boul. de Maisonneuve West
Downtown Montreal
T: 514-847-9005**

JOINT MEETING – CCDAO & CITE

Thursday, February 22nd, 2018

JOINT EVENT: Council for IT Executives and the Council for Chief Data & Analytics Officers

8:00 a.m. Meet in the Renaissance Hotel lobby to travel together as a group

Meeting Location: CN, Canadian National Railway Co., 935 de la Gauchetière St. West, Montréal QC, H3B 2M9 Boardroom – Lobby Level

8:15 a.m. Networking Breakfast

8:45 a.m. Welcome, Opening Remarks and Ice Breaker

**Marianne Fotia, Manager, Executive Networks
The Conference Board of Canada**

**Andrew Pender, Associate Director, Privacy and Corporate Security
The Conference Board of Canada**

9:15 a.m. IT and Data Analytics Panel and Roundtable

Jeff Hutchinson, Global Chief Information Officer, Bombardier

Mr. Hutchinson is responsible for leading Bombardier's global IT, digital asset and cyber security functions. In this capacity, he has responsibility for establishing a strong portfolio of world-class IT strategies, services, and offerings, in support of Bombardier's 2020 goals and longer-term strategic plan. Bombardier is the world's leading manufacturer of both planes and trains. Looking far ahead while delivering today, Bombardier is evolving mobility worldwide by answering the call for more efficient, sustainable and enjoyable transportation everywhere.

Colin Tibbo, Chief Information Officer, Marine Atlantic Inc.

Marine Atlantic provides ferry services on two routes: the first is a year-round, 96 nautical mile daily ferry service between Port aux Basques, Newfoundland and Labrador and North Sydney, Nova Scotia, and the second, offered from mid-June until late September, is a 280 nautical mile tri-weekly ferry service between Argentia, Newfoundland and Labrador and North Sydney, Nova Scotia. Marine Atlantic is a Crown corporation and is committed to safety and environmental responsibility.

Yves Giroux, Assistant Commissioner, Strategy and Integration Branch, Canada Revenue Agency

The Canada Revenue Agency (CRA) administers tax laws for the Government of Canada and for most provinces and territories, in addition to various social and economic benefit and incentive programs delivered through the tax system. As the Assistant Commissioner of Canada Revenue Agency's Strategy and Integration Branch, Monsieur Giroux is responsible for sustainable development at the CRA. Prior to joining the CRA, Monsieur Giroux held the position of Director of Operations in the Liaison Secretariat for Macroeconomic Policy at the Privy Council Office where he advised senior PCO officials and the Prime Minister on topics such as fiscal and economic policies, the financial sector, and tax policy proposals. He has also worked as the Senior Chief and then Director of the Department of Finance's Social Policy Division, in addition to working in the Department of Finance's Tax Policy Branch and at Employment and Social Development Canada. He holds a bachelor and Master's degree in Economics from the Université de Montréal.

JOINT MEETING – CCDAO & CITE

Eugene Wen, Vice-President, Head of Group Advanced Analytics, Manulife

Manulife Financial Corporation is a leading international financial services group providing forward-thinking solutions to help people with large financial decisions. Dr. Wen is responsible for supporting group functions with advanced analytics, build a Center of Expertise (CoE) in advanced analytics, provide thought leadership, create governance and policy frameworks for analytics function and provide research and development capabilities to businesses across the company.

10:30 a.m. Networking/Health Break

11:00 a.m. Enterprise Information Management (EIM) Journey at Federated Co-operatives

Faramarz Farahani, Executive Vice-President, Innovation, Federated Co-Operatives Limited

Federated Co-op Limited (FCL) and Co-operative Retailing System (CRS) operate 289 Food Stores, 101 Home Centres, 423 Gas Bars, 376 Commercial Cardlock Facilities and 143 Agro Centres across all four provinces in western Canada. In addition, they also operate a Refinery Complex, Petroleum terminal, 15 bulk Propane Branches, 6 Feed Plants, and 5 Food and General Merchandise Distribution Centres. The unique nature of the Federation and the wide range of products and services offered make their EIM landscape extremely complex. Federated Co-Op provides integrated solutions based on the single source of truth utilizing Enterprise Service Bus, Master Data Management and a number of other Data Warehouse and Business Intelligence technology components. The data journey at FCL started from a few silo reports and now have an enterprise-class data foundation built on state of the art data platforms, middleware integration tools, reporting, and analytics solutions. They have a centralized and dedicated team that supports current platforms and continuously develops new solutions.

12:00 p.m. Networking Lunch

1:00 p.m. Connecting with Open Data

Nathalie Lévesque, Access to Information and Open Data Coordinator, Canadian Space Agency

Martin Trudeau, Information Technology Manager, Canadian Space Agency

The Open Government Initiative requires federal institutions to connect with citizens in a new open, transparent, and accountable way. However, before posting its first dataset, the Canadian Space Agency had to first connect multiple internal partners to implement this cultural change. Now, IT and IM specialists closely work with engineers and scientists to reveal scientific datasets that could be useful to solve challenges and help improve the world. Nathalie and Martin will present the beginning of that journey

2:00 p.m. Networking/Health Break

JOINT MEETING – CCDAO & CITE

2:30 p.m.

Data Governance as an Enterprise Architecture Foundation

Dominic Jaar, Partner and National Leader, Forensic Technology Services, KPMG Canada

While IT functions have historically defined their scope to cover such elements as networking, storage, and support—relegating informational assets to the end users and their business units and administrative functions—the recognition of information, and in turn data, as a key asset for most organizations has created tensions in classical enterprise models. After defining Data Governance and identifying best practices, this session will explore how companies are creating, sometimes parallel, sometimes intertwined, structures led by Chief Data and/or Marketing Officers, and business units are hiring data scientists or outsourcing their data analysis needs, to identify the implications these new realities have on legacy IT structures. It will further provide ideas on how to turn disruptions into opportunities to collaborate, optimize, secure, and improve the management and use of data across the organization.

3:00 p.m.

Participant Roundtable Discussion

Facilitated by:

**Dominic Jaar, Partner & National Leaders, Forensic Technology Services
KPMG Canada**

4:00 p.m.

Adjournment

Next CCDAO Meeting: May 16 & 17, Ottawa, Ontario