

2024 ANNUAL REPORT



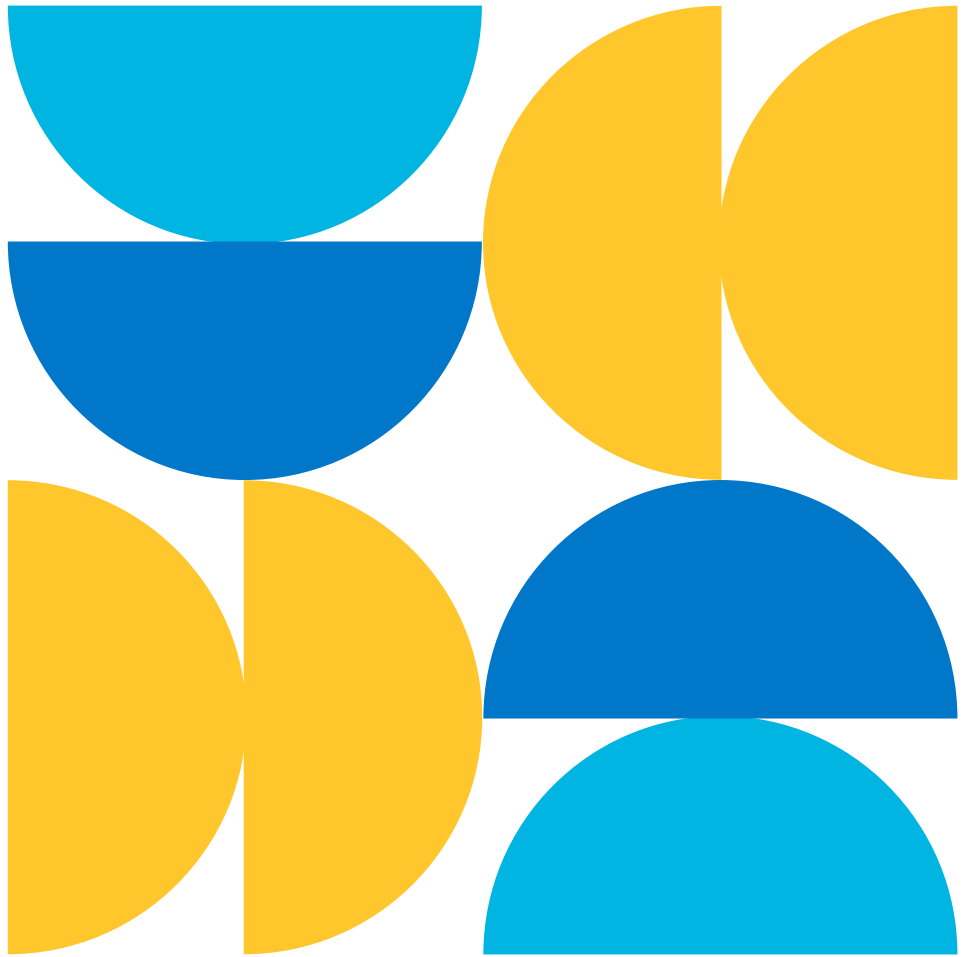


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MESSAGE FROM THE President and CEO



So much happens in a year that, when you look back, it can be hard for one achievement to stand out from all the others.

But 2024 was different. When I think back to last year, September 24 stands out both because it symbolized just how far the payroll profession has come since I joined the National Payroll Institute in 2018 *and* the potential we can still realize as a community.

As you know, the third week of September is National Payroll Week (NPW) in Canada. And so, on the third Tuesday of September, I began my day with over 100 members in Ottawa — one of 19 NPW events hosted across the country that week — celebrating the payroll profession.

The energy when members come together is *a/ways* electric and memorable, but this year felt like there was just a bit more of it than in the recent past. On that day, Ottawa's payroll community showed up with enthusiasm to support their profession and highlight the value that payroll provides to the economy, employers and working Canadians alike. New graduates were recognized. Stewart Reynolds (AKA Brittlestar) — our national payroll party correspondent, fresh off a tour across Canada to ask Canadians to rally Canadians to make the third Tuesday in September the "National Day to Recognize Payroll Professionals" — delivered equal parts inspiration and laughter during a keynote presentation. And, more importantly, we genuinely enjoyed being together as a profession.

The NPW event that morning ended in a fitting way when, to show payroll's commitment to supporting workers from coast-to-coast, we rose to sing "O Canada". Fitting because, when the singing was done, I was whisked to the House of Commons to witness something truly amazing — The Honourable Mona Fortier, Deputy Government Whip, rising to formally recognize National Payroll Week and thank *you* (the payroll professionals across Canada) for the work you do to keep Canadians paid. As she said, "the work of payroll experts contributes to the strength of our economy and the financial well-being of workers and enables our government to provide the support that Canadians need."

The success of that day certainly stands out, and it was not all that we accomplished during a year marked by success and growth. As a result, the National Payroll Institute is stronger than ever, ready to take on new challenges and continue building an even brighter future for payroll.

An engaged membership has always been at the heart of our success as an Institute. Last year was no different. We saw our community surpass 23,500 members. Our Conference in Halifax was attended by nearly 1,000 professionals eager to learn from leading speakers, including Canada's business dragon, Arlene Dickenson. Sixteen thousand members maintained a commitment to learning to support both their employer and career by attending a National Payroll Institute professional development seminar or webinar.

Finally, in what I believe is a positive sign of things to come, branches in Vancouver, Calgary, Toronto and Halifax were joined by hundreds of members at an inaugural set of events specifically intended to bring local payroll communities closer together.

Another contributing factor in the past year has been a focus on the quality and scope of services we deliver to members. The Payroll Infoline answered more inquiries than ever before (more than 46,000!). We introduced 10 new tools including AskPat, a payroll knowledge navigator named after Pat Glithero, PLP, who committed her life to helping others navigate complex payroll compliance requirements. Through our leading research, the *Competency Framework for Payroll Professionals* was launched in May and for the first time ever, established a clear set of skills needed to foster a successful career in payroll. And our Career Development toolkits attracted thousands of members looking to take the next step in their career journey.

Throughout the year, we also advanced our relationships with government leaders at every opportunity — not just through advocacy but a true sense of partnership. We were at the table advocating with both the federal and provincial governments, while also being named a trusted advisor governments turn to for payroll expertise and insight. As a result of this position and defined advocacy strategies that saw us deliver 17 distinct accomplishments, we drove positive change on several fronts. Among these accomplishments are making the TD1 available earlier, providing administrative relief related to dental code penalties, and advancing the development of a Real-Time Employment Data system, both federally and in collaboration with Revenu Québec.

All of this and I would be remiss not to celebrate the fact that the payroll profession and National Payroll Institute alike, rose to new heights of recognition in 2024. Increasingly, our research on financial wellness and employment trends (like remote and cross-border employment) is resulting in thought leadership positions. Leading journalists at top tier media-outlets are calling us for commentary. Our social media following has surpassed 50,000 individuals.

Registrations on [HCM DIALOGUE](#) which focuses on bringing payroll, HR, and finance together rose to over 5,000 by the end of the year. And our website, [payroll.ca](#) was visited more than one million times!

These accomplishments and the strength of the Institute are not an accident or the result of luck. They are a product of our future-focused strategy that has seen significant investments in strategic projects with tangible outcomes and outputs that are actively contributing to a positive future. From the creation of Payroll Standards Canada through research that definitively shows the value payroll provides today and tomorrow. And from new member benefits like AskPat and career toolkits, to our rebranding as the National Payroll Institute, the elevation of the profession and so much more. Likewise, these accomplishments are a result of our agility and resilience, as evidenced by our ability to overcome unexpected challenges. Finally, more than anything else they are the result of the hard work, dedication and skill of countless individuals: members of the Board of Directors who lead the way; volunteers who provide input and expertise on focused councils and committees; subject matter experts who freely share their knowledge and experience; mentors who support the next generation of professionals; and our staff who never fail to step up for members whom they truly care about.

I thank you all and know that, if we continue to move forward *together*, the best is yet to come.

Sincerely,



Peter Tzanetakis



MESSAGE FROM THE Board Chair

Throughout my more than 25 years in payroll, change has been the only constant.

Payroll is constantly adapting to new legislation, emerging technologies, employment trends with unintended administrative consequences, and broader societal challenges like the pandemic, economic uncertainty, and, reflecting on the current moment, political uncertainty. Through it all, our resolve and resilience have been proven. Employers and employees alike know they can count on payroll to do what is necessary to provide pay that is accurate, on time and in compliance with a complex set of legislative requirements.

As Chair of the Board of Directors, one thing I know is that the National Payroll Institute will be there to guide and support payroll every step of the way. The Institute is committed to elevating payroll, building a strong and connected community, and providing professionals across the country with the valuable services, tools, and resources needed to manage payroll and build rewarding careers. And we are investing the time and resources necessary to build real momentum towards these goals.

With regard to supporting career development, the [*Competency Framework for Payroll Professionals*](#) and the accompanying career progression guide were launched in May and immediately became a foundational resource for every payroll professional in Canada. It articulates succinctly the skills needed to succeed as a payroll professional — including, but not limited to, compliance and processing

pay. This has never been done before for payroll, but it is something that most regulated professions, like accounting, medicine, and engineering, have to guide them.

Personally, I was able to use the Competency Framework almost immediately. As soon as it was published, I shared it with my manager to shift the perception of what payroll is and does within our company, and encouraged him to approved updated job titles (from the outdated ‘clerk’ to the more appropriate ‘administrator’) for members of my team. To make a long story short, he quickly agreed!

When it comes to building a stronger and more connected community, which is a priority I shared during last year’s Annual General Meeting, we made considerable progress in 2024. If you attended any National Payroll Week event (which were attended by nearly 3,000 members) or Conference, which saw record levels of registration, you know that the engagement and energy were finally back to pre-pandemic levels. That’s not an accident. It’s part of the plan.

An important contributing factor that led to increased member engagement last year was a project to revitalize our volunteer program — particularly at the grassroots Branch and Council levels. As a part of that project, the Institute piloted member engagement events, which were attended by hundreds of members in Vancouver, Calgary, Toronto, and Halifax during the summer and early autumn. Held on evenings and weekends, events such as these will be

rolling out across the country in the year ahead with a focus on building bonds between payroll professionals. At the same time, the Institute is working towards a full restructuring of the Branches and Councils to create more (and more rewarding) opportunities to volunteer. As a longtime volunteer, I'm thrilled with this progress and excited for what it will mean for the next generation of volunteers, eager to share their expertise, effort, and time.

Last but certainly not least, elevating the perception of payroll among key stakeholders is a long-standing objective that the Institute once again focused on last year. For example, the Institute was recognized as a trusted advisor to government, helping them harmonize across jurisdictions and reduce red tape; and a key stakeholder on the Real-Time Employment Data initiative currently being undertaken by the federal and Quebec governments. Another important example is the heightened recognition our designations are receiving from the HR profession. Not only was the [Payroll Standards Canada](#) website visited more than 250,000 times, if you look at any payroll job posting, the odds are they are seeking a candidate with a PCP, PLP, or PPQ designation. It's clear that our designations are now seen as the gold standard for payroll knowledge and professionalism!

When I reflect on these 2024 accomplishments and too many more to name, the future of payroll feels like an opportunity we are already seizing.

To continue building on our hard-earned reputation, the National Payroll Institute has renewed its support for [Canada's Financial Wellness Lab](#) with the express goal of developing tools, resources, and more that can be delivered by payroll to directly support the saving, spending and debt related habits of working Canadians. When launched, this project will continue reframing payroll from being solely a process and compliance-based role to one that is also an important contributor to business wellness.

To give member engagement a boost, the Board of Directors has approved the launch of our first-ever Corporate Social Responsibility program for 2025. Following a vote of members, this

initiative will support Canadians experiencing food insecurity through charitable giving, member activations and awareness-building spread throughout the year. Coming together to make a meaningful difference as a community is something we can *all* be immensely proud of.

Finally, to continue supporting members, the National Payroll Institute is investing in future-focused strategies:

- That AI will impact payroll in a number of ways seems clear. To that end, the Institute is working with AI experts and undertaking research to create a roadmap that includes best practices, resources, and guidance so that we are prepared to succeed in the long-run;
- The structure of organizational memberships is being updated to provide more value, not just to individual members but to the organization as a whole;
- With government, the Institute is at the table and actively advocating for member needs on transformative issues, including the real-time employment data initiatives, Employment Insurance reform, and taxable benefits simplification; and
- We are leveraging the Competency Framework to update our Professional Development materials as well as our designation curriculum with support from experts at the University of Toronto.

All of this — the accomplishments of last year and the projects lighting the way toward the future — would not be possible without a steadfast and rigorous commitment to financial prudence, the contributions of volunteers, and a highly engaged staff. Thank you all for making my year as chair one that I will never forget, and contributing to so much payroll progress in 2024 and beyond.

With gratitude,



Mark Betcher, PCP
Chair of the Board

Board of Directors



Peter Tzanetakis
President and CEO
National Payroll Institute



Mark Betcher, PCP
Chair of the Board
Payroll Manager
Broadstreet Properties Ltd.



Brian Burgess, PLP
Vice-Chair of the Board
Director, Owner
Cycle Business Solutions



Carolyn Lesyshen, PLP
Past Chair
Payroll Supervisor
Servus Credit Union Ltd.



Elvira Ciambella, PLP
Treasurer
VP/GM Business Innovation,
Transformation and Shared
Services. General Manager
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**Tisha Parker Kemp,
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Founder and Principal
shiftED Academy Inc.

Board of Directors



Agnes Teper, PLP

Director

Owner, Elevated HR



Marty Sokolov, PLP, F. NPI

Director

Senior Customer Success
Manager, Workday



Deborah Scott, PLP, FPC

Director

Manager, Payroll at Canadian
Natural Resources Limited



Irene Paul, PLP

Director

Senior Principal Compliance
Advisor at UKG



OUR MISSION

We lead by setting THE standard of professional payroll excellence and cultivating and delivering expertise that is vital to the health of every business, critical to the economy, and essential to shaping public policy in Canada.

OUR VISION

The National Payroll Institute leads the payroll profession by setting THE standard of excellence, cultivating business-critical expertise, and strengthening the payroll community.

OUR VALUES

At The National Payroll Institute, our values guide us in shaping the future of payroll. Developed by the Board of Directors, they are pillars that help us bring our vision to life and deliver on our mission.

Value 1: **Empower & Inspire Leaders**

To live this value we must:

- Advocate on behalf of the payroll profession
- Guide and support others as they grow into leadership positions
- Set the professional standard for payroll
- Value lifelong education and learning

Value 2: **Lead Through Innovation**

To live this value we must:

- Listen to the needs of others and embrace change
- Continually assess and improve the value we deliver
- Create a culture of innovation, encouraging everyone to share ideas
- Show respect for all ideas
- Act decisively and remain agile

Value 3: **Nurture an Inclusive Community**

To live this value we must:

- Demonstrate an innate respect for different experiences, perspectives and cultures
- Foster a culture of collaboration
- Generate opportunities for others to speak
- Create and maintain safe and accessible spaces

Value 4: **Take Action with Integrity**

To live this value we must:

- Exemplify trustworthiness at all times through honesty, transparency, embracing hard truths and being accountable for our actions
- Recognize that how we act is often as important as the outcome
- Remember, always, that we are members of a broader community
- Embrace our Code of Professional Conduct

The Numbers Add Up

A YEAR OF NEW HIGHS

The National Payroll Institute's dedicated group of 45,000+ payroll professionals, volunteers, staff, and Board of Directors all play a crucial role in the Institute's success. In 2024, these groups contributed to achieving remarkable numbers. Whether it was a volunteer welcoming a new member at an event, a staff member being a friendly voice on InfoLine, or members talking about their success with a payroll designation, everyone in our payroll community plays a part in keeping the Institute strong and thriving.

THE VOICE OF PAYROLL



45,200

TOTAL PAYROLL PROFESSIONALS



BENEFITS OF MEMBERSHIP



46,849

CALLS AND EMAILS TO INFOLINE



224,944

LATE BREAKING
PAYROLL NEWS VIEWS



129,109

DOWNLOADS OF
PAYROLL GUIDELINES



\$402,855

DOLLARS SAVED BY OUR MEMBERS
USING MEMBER PERKS



DESIGNATIONS



1,647

NEW PCP, PLP, AND PPQ
DESIGNATION HOLDERS



3.7%

GROWTH IN TOTAL NUMBER
OF DESIGNATED MEMBERS



16,435

DESIGNATION COURSE
ENROLLMENTS

PROFESSIONAL DEVELOPMENT



15,061

PROFESSIONAL DEVELOPMENT
SEMINAR AND WEBINAR ATTENDEES



5,388

YEAR-END ATTENDEES
IN-PERSON AND ONLINE



4,075

MEMBERS TOOK ADVANTAGE OF
COMPLIMENTARY WEBINARS



EVENTS



2,774

NATIONAL PAYROLL WEEK
ATTENDEES ACROSS THE COUNTRY



1,496

CONFERENCE ATTENDEES
(IN-PERSON AND VIRTUAL)

GOVERNMENT ADVOCACY



15

MAJOR ADVOCACY
ACCOMPLISHMENTS



17

GOVERNMENT
SUBMISSIONS

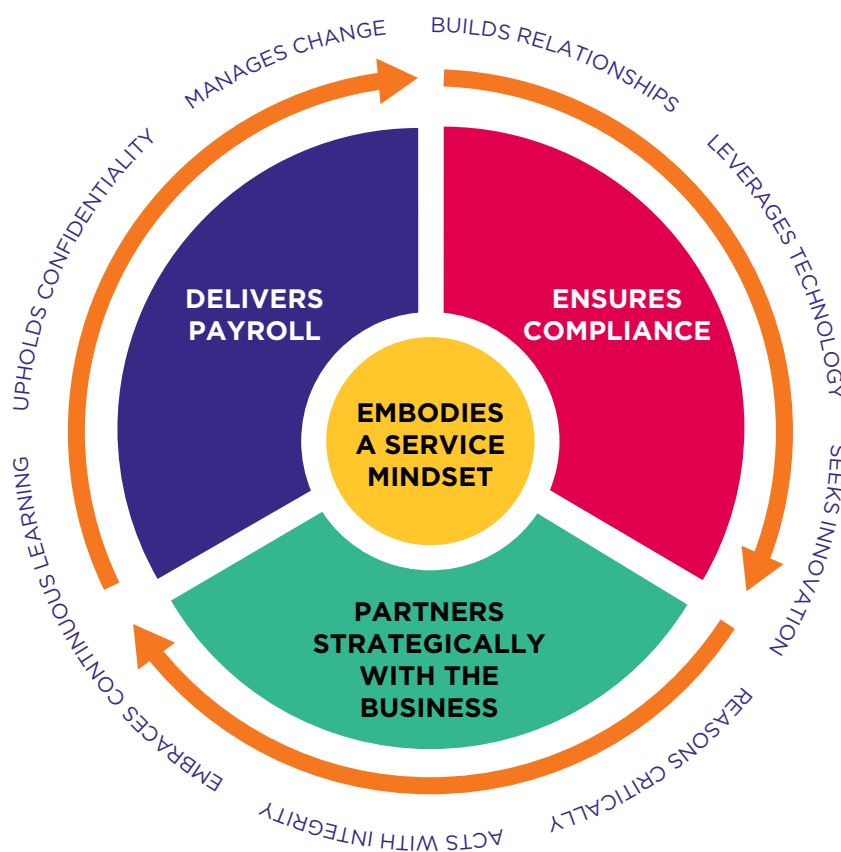
THE INTRODUCTION OF The Competency Framework for Payroll Professionals

In 2024, The National Payroll Institute launched a ground-breaking new resource, *The Competency Framework for Payroll Professionals (the Framework)*.



Mirroring recognized and regulated professions like accounting, HR and engineering, the Framework codifies the essential skills and behaviours needed to succeed and advance in the payroll profession for the first time ever. At the heart of the Framework is a comprehensive competency map, outlining four core competencies:

- **Delivers Payroll** — by executing payroll accurately and on time.
- **Ensures Compliance** — by being accountable for payroll regulatory and business compliance.
- **Embodies a Service Mindset** — by fostering a customer-centric approach and continuously seeking to improve service offerings.
- **Partners Strategically with The Business** — by supporting the achievement of business objectives as a trusted and respected partner and advisor.



Beyond these four core competencies, the Framework breaks down into sub-competencies and supporting practices. It also identifies key behavioural competencies, or soft skills, giving payroll professionals a full and detailed scope of what it takes to succeed in the profession.

Of particular note, the Framework includes a payroll career path, intended to guide payroll professionals in their own career journey.

TWO YEARS OF RESEARCH AND DEVELOPMENT

To develop *The Competency Framework for Payroll Professionals*, the National Payroll Institute embarked on a thorough research process, spanning over two years. Between surveys, focus groups and input from external stakeholders, no stone was left unturned.

Results from a national survey indicated that most payroll professionals (53 per cent) want to grow their career in payroll, but 20 per cent were uncertain about their career growth or are looking to develop their skills outside the profession. It was this research that demonstrated that payroll needed a guiding framework.

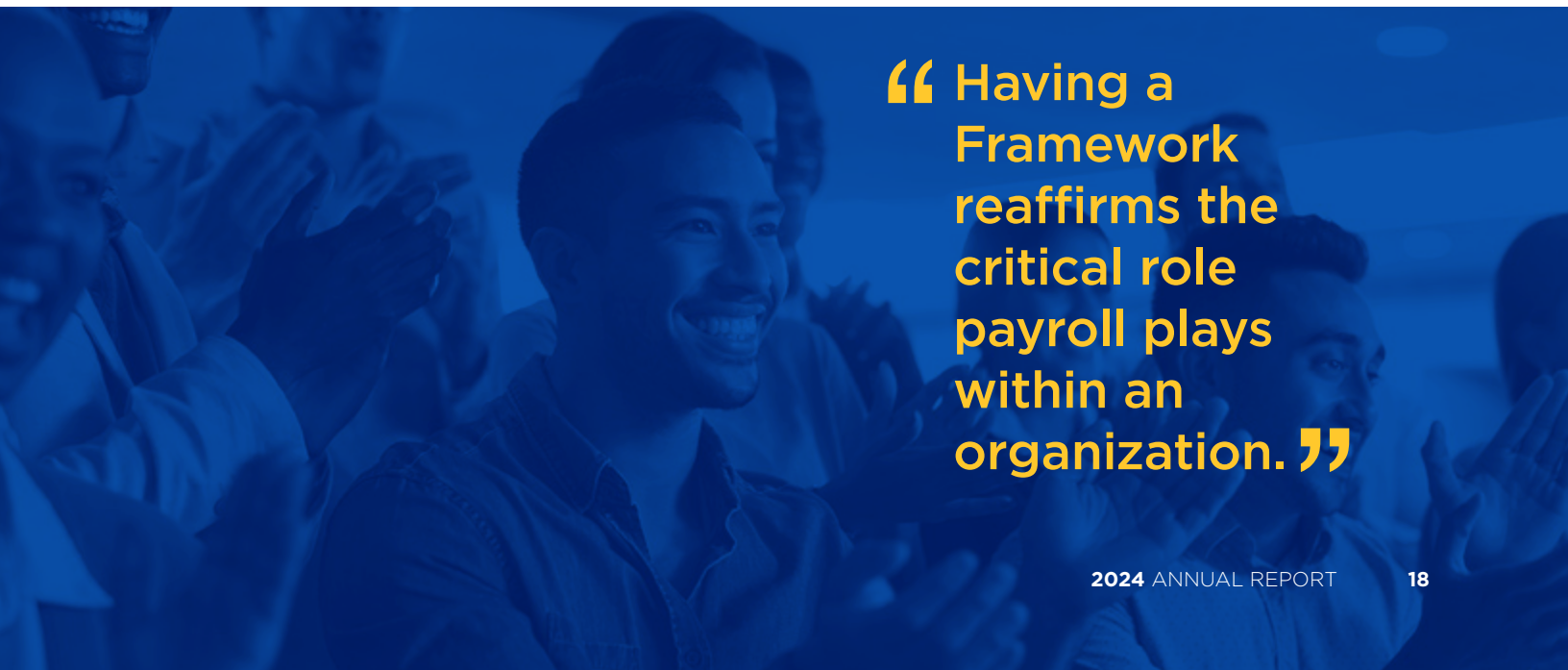
“The payroll profession has been on a journey. In recent years, we’ve experienced significant changes as payroll has become valued for its essential contributions to the success of every employer and the financial wellness of workers across Canada,” explains Steven Van Alstine, Vice President of Education and Professional Standards. “As the pace of change continues to accelerate, the *Competency Framework for Payroll Professionals* will guide both the National Payroll Institute and the payroll profession towards even greater heights as a strategic business partner.”

ADVANCING THE PROFESSION

The response from members has been overwhelmingly positive, but one member’s story stands out. After transitioning into a new role as Payroll Manager at their organization, the member discussed the payroll department with their CFO, noting the title for payroll staff was still “Payroll Clerk.” By leveraging the Competency Framework, they were able to successfully advocate for a change, upgrading the title to “Payroll Administrator.”

“Having a framework reaffirms the critical role payroll plays within an organization,” adds Van Alstine. “It’s no surprise that payroll professionals need to deliver payroll and ensure compliance. By embodying a service mindset and partnering strategically with the business, payroll professionals can demonstrate their value and find growth opportunities within their organization.”

Now, as the payroll profession continues to evolve, the *Competency Framework for Payroll Professionals* will directly inform the Institute in shaping the educational requirements for earning designations, setting professional standards, and ensuring payroll professionals are equipped to meet the challenges of an everchanging landscape. With this new resource in hand, payroll professionals can advance in their careers knowing they have the tools they need to demonstrate their value, and unlock new opportunities for growth. 🌱



“ Having a Framework reaffirms the critical role payroll plays within an organization. ”

SOCIABLE!

A Recap of the National Payroll Institute's 2024 Annual Conference

By Erin Griffin, Manager of Public Relations, National Payroll Institute

It never fails. When the payroll community comes together in full force, it makes its presence known. That was certainly the case with the Institute's 2024 Annual Conference in beautiful Halifax, Nova Scotia, from June 19 to 21.

Nearly 1,000 attendees rolled into downtown Halifax for the event, making this the **biggest Conference turnout in the Institute's history!**



Our Early Risers club ready to get some exercise and explore Halifax.



President Peter Tzanetakis kicking things off with opening remarks.

LEVEL UP

The Conference's theme this year was LEVEL UP — and the payroll profession took that to heart. They took part in 47 education sessions across eight education tracks, engaged in invigorating conversations with sponsors, and added their voices to roundtables and panel discussions. The energy throughout the Conference centre was palpable!



Getting the perfect professional headshot, sponsored by UKG.



Canada Revenue Agency update.



Facilitated panel discussions with industry leaders.



Welcoming the 2024-25 Board of Directors at the Annual General Meeting.



Diamond sponsors ADP with keynote speaker Arlene Dickinson (far left).



Attendees enjoying the photo booth at Fun Night.

Attendees also heard from two inspiring keynote speakers: Canadian entrepreneur and TV personality Arlene Dickinson; and renowned author, speaker and workplace happiness expert Jennifer Moss.

The Fun Night celebration was themed “Sociable by the Sea” — a kitchen party-inspired event featuring all things Maritimes. Guests danced late into the evening. It was truly an experience to remember.

In 2025, the Institute will bring the festivities to Calgary, Alta. from June 4 to 6. Plan to join us for another unforgettable Conference with your payroll community!





Advancing Payroll for a Stronger Future

Over the course of 2024, the National Payroll Institute made significant progress on several strategic initiatives to deliver on our core objectives to be the leader of the payroll profession and enhance our value to members.

Collectively, these projects underscore the Institute's dedication to advancing the payroll profession, addressing regional nuances, and embracing technological advancements.

As they unfold in 2025, they will bolster the Institute's visibility and solidify support from stakeholders.

PROFESSIONAL DEVELOPMENT (PD) ROADMAP

Recognizing the evolving landscape of the payroll profession, the Institute launched a Strategic Project to develop a comprehensive Professional Development (PD) roadmap — one that outlines a structured path for payroll professionals to enhance their skills and advance their careers, while keeping the Payroll Competency Framework top of mind.

When implemented, this project will define a clear progression of educational opportunities; helping the Institute support members in growing their career, mastering complex legislation, confidently supporting the health

of their organization, and staying abreast of industry changes.

In order to effectively undertake this initiative, a competency assessment was undertaken to explore areas of current PD programming that might be enhanced, augmented, or aligned to the competency framework developed by the National Payroll Institute. In total, 44 PD sessions (seminars and webinars) were analyzed based on the following:

- Session learning objectives;
- Session overviews;
- Curriculum descriptions;
- Sample session slides, manuals ('master materials') and recordings;
- NPI 2023 Member Survey data and common payroll metrics.

The insights and recommendations included in the final report, prepared by the University of Toronto School of Continuing Studies, were based on key inputs provided by the Institute, including documentation on current PD programming, as well as critical information shared during project design conversations, and PD facilitator focus groups. The resulting outputs and roadmap have set the stage for a dramatic future for education and training provided by the National Payroll Institute.

PAYROLL LEADERSHIP PROFESSIONAL (PLP) REDESIGN

In response to the dynamic needs of the payroll industry, the Institute also undertook a deep review of the payroll designation programs and curriculum with the same lens that was used to develop the PD Roadmap. The emphasis was on the payroll competency framework and ensuring that the future needs of the payroll profession were paramount.

The outputs highlighted key insights and recommendations to support the National Payroll Institute in enhancing and aligning our designation programming to *Competency Framework for Payroll Professionals*, as well as to key research outcomes outlined in *The Future of Payroll Education and Skills*. The insights and recommendations included in the roadmap were based on inputs and documentation provided by the Institute, including documentation on current designation programming, as well as critical input shared during project design conversations, and instructor discussions held over the course of the initiative.

One of the biggest components of the roadmap is to undertake a redesign of the Payroll Leadership Professional (PLP) program. The redesigned PLP program will emphasize strategic management skills, advanced compliance knowledge, and the integration of innovative payroll solutions, all while focusing on leadership in the payroll space.

ELEVATING PAYROLL AND THE NATIONAL PAYROLL INSTITUTE IN QUEBEC

Quebec is unique — culturally, linguistically, and economically.

It was with this fact in mind that the Institute initiated the Quebec Market strategic project. The goal: to develop a unique, research-based, and purpose-built strategy to continue elevating the payroll profession from Gatineau to Saguenay (and everywhere in between).

This project began in late 2023 when we engaged leading market research firm Leger, to help us understand the needs of the business community in Quebec and to develop actionable insights. In 2024, a working group of staff from every department came together to compile those insights into a multi-year plan to evolve our products, services, message, and more for the specific needs of Quebec businesses and payroll professionals.

In early 2025, you'll see the first phase of the project come to life with a grassroots marketing and communications campaign to reframe the value of payroll with business leaders and influencers throughout La Belle Province.

Phase II, targeted for 2027 and beyond, will see the introduction of new products and services to meet the particular needs of Quebec.





MODERNIZING PAYROLL REPORTING WITH EPAYROLL

The ePayroll project, an initiative by the Government of Canada, aims to modernize payroll reporting by introducing a “tell-us-once” approach to reduce redundancy and ensure data integrity.

By reporting payroll information every pay cycle and harmonizing across multiple government departments, the goal of ePayroll is to streamline processes, enabling faster and more accurate service delivery, thereby benefiting the Canadian economy.

As a trusted advisor to government, the National Payroll Institute has been asked to contribute feedback to the initiative.

The Institute’s research on global examples, such as Australia’s Single Touch Payroll (STP) and the U.K.’s Real Time Information (RTI), have provided examples of how cyclical payroll reporting to government has proven successful. In Australia, STP has reduced administrative burdens and improved tax data accuracy, while the U.K.’s RTI has eliminated the need for end-of-year forms, ensuring up-to-date payroll data and enhancing compliance.

By leveraging these successful models, ePayroll can harmonize reporting to the Canada Revenue Agency, Service Canada, and Revenu Québec, and drive significant improvements for employers, employees, and government alike.

In 2025, the Institute will continue to advise the government on how to introduce a made-in-Canada approach to ePayroll. “

Engaging Members, Strengthening Community



In 2024, a focus of the National Payroll Institute was to increase engagement with members from coast-to-coast-to-coast through valuable and carefully curated events, and revitalizing what it means to be a grassroots volunteer. At the heart of this focused effort is someone that has seen more change than anyone at the National Payroll Institute – Deborah Hunt who, in 2025, is celebrating her 30th anniversary as an Institute staff member.

“Members have always been at the heart of everything we do at the National Payroll Institute,” explains Hunt, Team Lead of Member Engagement & Events and Conference Producer. “Last year, we made it our purpose to strengthen our community bond by enhancing existing events, introducing new social opportunities, and updating both the composition and objectives of local branches and regional councils.”

The past year was a landmark one for Institute events. The 2024 National Conference in Halifax made history by having the highest number of registered attendees ever. The unique energy of the east coast created an atmosphere of unity and excitement, drawing members from across the country to celebrate the past, present, and future of payroll.

National Payroll Week experienced a resurgence in 2024, with registrations returning to pre-pandemic levels. A new addition this year was the special recognition and celebration of designation graduates. With 20 events held across the country, the week was filled with camaraderie and highlighted the strong sense of community that defines the National Payroll Institute.

“Our strategy for 2024 was centred on creating experiences that would not only bring members together they would celebrate the shared journey of the payroll profession,” says Hunt.

“By adding recognition of designation graduates and expanding National Payroll Week events, we aimed to foster deeper connections and create lasting memories for all our members.”

One other standout initiative from the past year was the introduction of branch-level member social events, a pilot project designed to give members the opportunity to connect in fun, relaxed settings. These events, which included a Calgary Stampede Breakfast, High Tea in Toronto, Apple Picking in Halifax, and Sailing the High Seas in Vancouver, proved to be incredibly popular and offered members a fresh way to connect.

Looking ahead, Hunt says she’s looking forward to streamlining the volunteer experience with a new structure that includes an expansion of social events to all branches, new regional roundtables, and new roles and opportunities on branches and councils.

“I’ve had the privilege of seeing the Institute evolve from a volunteer-led organization to a staff-led organization, so I’ve seen firsthand how powerful volunteering can be. My goal is to empower our volunteers to engage with our community in a meaningful way,” she adds.

With the continued commitment of staff like Hunt and dedication of volunteers, the Institute is well-positioned to continue fostering a vibrant and powerful community for years to come. «

“Members have always been at the heart of everything we do at the National Payroll Institute.”

ADVOCATING FOR PAYROLL: 2024 Accomplishments

The Federal Government Relations Committee (FGRC) plays a key role in shaping the National Payroll Institute's policy positions and advocacy efforts at the federal level. Composed of dedicated Institute volunteers, the FGRC provides strategic counsel on what issues to prioritize and how best to represent the payroll profession in front of the federal government.

It is currently led by Chair Giovanni Stea, PLP, and Vice-Chair Maureen Olson, PLP. Together they make an exceptional leadership team that combines experience from both the payroll service provider and employer perspectives.

As a trusted advisor to the federal government, the National Payroll Institute relies on insights and feedback from the FGRC to identify initiatives to increase the efficiency of payroll-related legislation, regulation, and administration.

"We come from different parts of the payroll world - service providers, employers, different regions but when we sit at the FGRC table, we all take off our 'day job' hats and speak for the broader profession. That diversity is our strength," says Stea.

With members representing industries from across Canada, the FGRC brings a holistic perspective to the table. Their work contributes significantly to the National Payroll Institute's objectives of reducing administrative burdens on employers and payroll professionals while improving compliance for all stakeholders.

"Being recognized as a trusted advisor by federal partners like the Canada Revenue Agency (CRA) and Employment and Social Development of Canada, that's huge" says Olson. "It means payroll is shaping policy in ways that make a real difference to employers across Canada."

In 2024, the National Payroll Institute's advocacy efforts resulted in major accomplishments including securing a continuation of the T4A moratorium, providing administrative relief for dental benefit reporting, and acting as a trusted advisor to government in reviewing the CRA's Payroll Formulas Guide.

SECURING T4A MORATORIUM

As a result of sustained engagement with the CRA, the National Payroll Institute secured a continued moratorium on assessing penalties for failing to report fees for services on the T4A slip pending more efficient administration on

“We come from different parts of the payroll world - service providers, employers, different regions but when we sit at the FGRC table, we all take off our ‘day job’ hats and speak for the broader profession. That diversity is our strength.”

a non-payroll form. This has tangible benefits for both businesses and individuals. Businesses' administrative challenges have been documented in the CRA's [What We Heard](#) report. And individuals who hire services such as babysitters, a tutor, or landscapers are not burdened with T4A filing for these fees.

ADMINISTRATIVE RELIEF FOR DENTAL BENEFIT REPORTING


The introduction of a dental benefit reporting requirement for 2023 T4 and T4A slips presented a significant administrative challenge for employers, as well as payroll service and software providers. This was largely due to the counter-intuitive rule requiring the new dental box to be populated on all T4 slips — even by employers who did not offer dental benefits. The National Payroll Institute successfully advocated for relief measures, ensuring that 2023 slips would not be rejected if the dental code box was left blank by an employer that did not offer dental benefits and made reasonable efforts to comply.

In 2024, as employers continued to face difficulties with dental reporting requirements, the FGRC advocated for the extension of penalty-free administrative relief. Their efforts resulted in the CRA and Health Canada maintaining these measures for another year.

“The continued administrative relief of dental benefit reporting was, without question, a big win for us,” says Stea. “We made sure the government understood the real-world impact on small businesses and payroll providers. That kind of advocacy is what the FGRC is here for.”

CORRECTIONS TO THE CRA PAYROLL DEDUCTIONS FORMULAS GUIDE

As a sub-committee of the FGRC, the Readability Committee – comprised primarily of dedicated members from the Payroll Service and Software Provider sub-committee – brings both expertise and attention to detail to ensure accuracy and compliance. This year, the CRA requested the FGRC's Readability Committee (a subgroup of the FGRC) to review a draft version of the Payroll Deductions Formulas Guide, a key resource used by employers to calculate federal, provincial, and territorial income tax.

During the review, the Readability Committee identified a number of pay calculations that required clarity for the profession, which would in turn support the right of every working Canadian to accurate and timely pay. Thanks to the committee's careful review, these issues were identified and addressed for the final release of the guide. 

INTRODUCING

Ask Pat

A REVOLUTIONARY
KNOWLEDGE NAVIGATION
TOOL FOR PAYROLL
PROFESSIONALS

In payroll, the sheer volume of information that professionals need to navigate is daunting. Whether it's staying on top of changing compliance requirements or accessing trusted best practices, finding the right information quickly is vital. Recognizing this challenge, in 2024, the National Payroll Institute introduced *Ask Pat*, a powerful new knowledge navigation tool.

Ask Pat is designed to help Institute members find the specific compliance and best practice information they need – saving the time and stress required to sift through countless resources. And using the tool is easy. It allows members to type in keywords and immediately access accurate, trusted and organized information on topics like statutory holidays, vacation policies, and more through a single, centralized online resource.

Ask Pat is continually evolving, with new topics being added regularly to ensure that it remains a comprehensive resource for all members. Throughout 2024, new features were added, providing members with:

- **Expanded Search Capabilities:** members can now search for information on Salary Overpayments and Terminations. These topics, along with many others, are now part of the tool's growing knowledge base, providing up to 10 helpful search results for each query.
- **New Question Submission Feature:** members can now send questions directly to the Payroll Infoline from within *Ask Pat*. This new feature streamlines access to expert support, ensuring all inquiries are answered quickly and accurately.

Since its official launch on May 15, 2024, *Ask Pat* has quickly become a cornerstone of the membership experience. The response from members has been overwhelmingly positive. Some impressive highlights from the tool's early months include:

- Over **16,000 searches** conducted
- **94 per cent** user satisfaction rate

Looking ahead, The National Payroll Institute plans to continue adding more payroll-related information to the tool, to make it as comprehensive as possible. The tool's development is part of the Institute's ongoing commitment to offer cutting-edge tools that empower payroll professionals to excel in their roles.



Ask Pat is named in honour of Pat Glithero, PLP, who dedicated her life to sharing her payroll knowledge and expertise with generations of professionals. As an instructor, professional development facilitator, volunteer, and employee of the Institute, Pat left a legacy that continues to inspire us all. Sadly, Pat passed away in 2022, but her contributions to the profession live on through *Ask Pat* and the many students she mentored.

national payroll party



LOOKING BACK ON NATIONAL PAYROLL WEEK 2024:

A Rally for Payroll

For nearly three decades, the National Payroll Institute has celebrated National Payroll Week in September. Historically, it's been a time to come together to recognize the vital role payroll professionals play for employers, employees and their families, communities, the economy and the government.

In 2024, the Institute embarked on a campaign that recognized payroll in a BIG way, by introducing the national payroll party to Canada.

After conducting extensive research, including a national survey, the course was clear, and the stage was set; it was time to rally support for payroll among working Canadians from coast to coast to coast. With the help of Acroo the Owl (our payroll party starter) and ambassadors, Stewart Reynolds (a.k.a. Brittlestar) and his son, Gregor Reynolds, Canadians were called upon to raise their voices and show business leaders and government officials that payroll is vital to every working Canadian.

Starting in Ottawa and continuing through some of the biggest summer parties in Vancouver, Calgary, Winnipeg, Toronto, Montreal, Fredericton, Charlottetown, and Halifax, Canadians enthusiastically shared the impact payroll has on their lives and signed a petition to make the third Tuesday in September a national day of recognition for payroll professionals.

What became clear over the course of the journey is that payroll is essential. It's at the heart of every business, crucial to the Canadian economy, and those who ensure payroll deserves greater appreciation.

The rally call – amplified by the National Payroll Institute's advocacy effort – was so loud, that the government couldn't help hear the cry.

On Wednesday, Sept.18, as thousands of payroll professionals gathered to celebrate National Payroll Week across the country, Peter Tzanetakis, president and CEO, was invited to the House of Commons where the Honourable Mona Fortier, Deputy Government Whip, recognized and thanked payroll professionals for their hard work keeping Canada paid.

Listen to what she had to say by scanning the QR Code!



2024 AWARD WINNERS

The National Payroll Institute was pleased to recognize payroll excellence at the Conference with the 2024 awards. These individuals have demonstrated unparalleled leadership, service and commitment to our profession and community, and deserve our applause. Congratulations!

DIANA FERGUSON FOUNDER LIFETIME ACHIEVEMENT AWARD

This award recognizes outstanding contribution by individuals to the advancement of the mission, objectives and values of the National Payroll Institute. This is one of the highest honours members can receive.



Sandra Morrison, PLP, F.NPI, CPHR, SHRM-SCP

Sandra has played a pivotal role in the National Payroll Institute's growth for over two decades. From Subject Matter Expert to Chair of the Board, her commitment to payroll has been steadfast. As Chair, she championed the strategic renewal of the Institute, guiding it with the vision to be THE leader for the payroll profession in Canada. Her expertise has also been crucial across numerous task forces, highlighting her comprehensive knowledge and dedication. Sandra's leadership and strategic thinking have not only shaped the profession but also set a high standard for the future.



Norma Dubé, PLP, F.NPI

Norma began with the Institute in the 1980s, and her passion and dedication have benefitted payroll professionals across Canada ever since. Her work in the strategic redevelopment of the professional designation programs and her contributions to the Board led to the creation of what are now cornerstone designations for over 17,000 payroll professionals. Norma was a respected speaker, instructor and active participant in government relations councils. Her ability to forge strong relationships was unmatched, connecting the Institute with global partners and laying a foundation that continues to support the payroll profession worldwide.

FELLOW OF THE NATIONAL PAYROLL INSTITUTE

The Fellow of the National Payroll Institute Award recognizes distinguished payroll professionals who have devoted their careers to not just excelling in their field but elevating the profession itself.



Kim Lapierre, PLP

Kim has dedicated nearly four decades to advancing the payroll profession and enhancing the strategic impact of payroll within organizations. His influence spans thought leadership, advocacy and mentorship, each contributing profoundly to the community. Kim's insights into payroll trends and compliance have guided practitioners and policymakers alike, and his dedication to ePayroll initiatives and advocacy exemplify his role as a thought leader and changemaker. In addition, Kim's role as a mentor has been invaluable. His diplomatic approach and mindful advocacy have contributed to the success of many payroll professionals.



Lynne Harkness, PLP, CHRL

Lynn has been with the Institute for over three decades, a tenure marked by dedicated service and a profound commitment to advancing the profession. Since joining the Peel Branch in 1998, Lynne has been at the forefront of numerous projects, co-chairing a National Conference, leading the Peel Branch and serving on the national Board. She has contributed her expertise to the professional designation programs, and her charismatic presence as Master of Ceremonies has elevated many of our events. Lynne's recent work on the Nominations Committee and the EDI Task Force showcases her ongoing commitment to excellence and inclusivity within the Institute.

THE PATRICK CULHANE SPECIAL CONTRIBUTOR AWARD

This award recognizes an individual or organization that has made a contribution to the payroll profession.



Lynne Yryku

Lynn is the managing editor of *DIALOGUE*, where she masterfully communicates the core values, missions and strategic directions of the Institute to its members, enhancing their understanding and engagement. Her dedication to capturing the essence of the Institute's vision has been instrumental in raising the profile of payroll professionals as vital strategic partners to senior leaders. For over 15 years, Lynne's extensive service to the Institute and her strategic influence beyond her editorial duties have demonstrated her commitment to both the organization and the broader payroll community.



Anne Théa Vuillemin

Anne has been an instrumental force behind the scenes at the Institute for nearly three decades, meticulously translating our payroll education content into French. Her role has been crucial in ensuring that the intricate vernacular of the profession is accurately and effectively conveyed to French-speaking members. Her work is celebrated for its precision and deep understanding of the Quebec audience, enhancing the relevance and accessibility of the Institute's offerings. As Anne Théa enters retirement, her legacy will continue to influence the profession for years to come.



THANK YOU TO OUR Volunteers

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Alison Clemmensen, PLP

Allison Chiponski, PLP

Amanda Braget, PLP

Amanda Gauthier, PLP, FPC

Amanda Valliere, PCP

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