

CAPIC ADVOCACY POLICY
Based on the provisions of CAPIC By-law and Board Policies
APPROVED BY THE BOARD OF DIRECTORS ON [SEPTEMBER 26,2024]

1. PREAMBLE

1.1 CAPIC's Advocacy Policy covers the operational processes of the Lobbying and Policy Committees, based on the provisions outlined in the Board Policy, Committee Charter and Mandate, and the By-Laws.

1.2 This policy should be read in conjunction with the charter and mandate of the Lobbying and Policy Committees.

2. OBJECTIVES

2.1 The purpose of the Advocacy Policy of The Canadian Association of Professional Immigration Consultants (CAPIC) is:

- i. To outline and ensure that set protocol is being respected for all advocacy activities conducted.
- ii. To ensure the transparent and accountable process of execution of advocacy to members and the public.
- iii. To optimize the value of CAPIC's professional interest through advocacy as a member service.
- iv. To ensure the effective use of staff and volunteer resources to achieve results in CAPIC's advocacy efforts.
- v. To influence immigration policy and legislation in ways that benefit both the profession and the public.
- vi. To enhance public and governmental understanding of the role and value of immigration consultants.

3. SCOPE

3.1 This policy applies to all advocacy activities undertaken by CAPIC, including lobbying, public relations, community engagement, and policy development.

3.2 It covers interactions with federal, provincial, and municipal governments, as well as other stakeholders.

4. PRINCIPLES

4.1 CAPIC's advocacy efforts will always be guided by the following principles:

- i. **Integrity:** Conducting advocacy activities with honesty, transparency, and accountability.

- ii. **Professionalism:** Reflecting high standards of the immigration consultancy profession.
- iii. **Inclusivity:** Considering the diverse views and needs of all members.
- iv. **Evidence-Based:** Basing advocacy positions on solid research and evidence.

5. ABOUT CAPIC

The Canadian Association of Professional Immigration Consultants (CAPIC) is a not for profit, nonpartisan, non-political Professional Association of Canadian Immigration and Citizenship Consultants that attends government consultative meetings on a regular basis. These meetings include but are not limited to: Immigration, Refugee, Citizenship Canada (IRCC), Canada Border Services Agency (CBSA), Employment and Social Development Canada (ESDC), Immigration and Refugees Board (IRB), Immigration Quebec, Federal & Other Provinces, other regional meetings, and territories. CAPIC also conducts advocacy activities that align with its objectives on public policy and member issues with various high-level stakeholders, including the College of Immigration and Citizenship Consultants (CICC) and other like-minded NGOs.

CAPIC's operational team shall be the primary coordinator and the initial point of contact for all stakeholders and facilitation of meetings with government bodies.

6. ADVOCACY ACTIVITY/PROCESS

CAPIC's Advocacy method is mostly by written and oral submissions through two of its committees of Lobbying and Policy.

6.1. Lobbying

- i. **Target Audience:** Federal, provincial, and municipal government officials, policymakers, and relevant stakeholders.
- ii. **Methods:** Meetings, letters, position papers, and presentations.
- iii. **Compliance:** Ensure all lobbying activities comply with federal and provincial lobbying regulations.

6.2. Public Relations

- i. **Target Audience:** General public, media, and other relevant stakeholders.
- ii. **Methods:** Press releases, media interviews, public statements, and social media.
- iii. **Message:** Promote the professionalism, expertise, and importance of immigration consultants.

6.3. Community Engagement

- i. **Target Audience:** CAPIC members, citizenship and immigration seekers and Canadian public, community organizations.
- ii. **Methods:** Surveys, forums, town halls, and educational workshops.

- iii. **Objective:** Gather input, build relationships, and foster collaboration.

6.4. Policy Development

- i. **Target Audience:** Government and regulatory bodies.
- ii. **Methods:** Research, policy analysis, and drafting policy recommendations via submissions and presentations.
- iii. **Focus:** Develop policies that support the profession and address emerging issues.

7. SUBMISSIONS

7.1 Definition of a submission: Submissions consist of expressing policy, analysis, recommendation, endorsement, or positions communicated by CAPIC to other organizations, individuals or to the public. They include expressions represented by the position of CAPIC members and CAPIC Policy Committee and Lobbying Committee Members.

7.2 Submissions Include:

- i. Written briefs.
- ii. CAPIC Advocacy Correspondence written on behalf of CAPIC.
- iii. Oral presentation/ submissions based on written briefs on Lobbying and Policy Matters.

8. DRAFTING GUIDELINES

The following is a brief guide to the form and content of CAPIC Advocacy submissions for the distribution to governmental bodies.

8.1 Table of Contents: List the topic headings in the submission, with the page numbers.

8.2 Executive Summary (to be included only in longer submissions): An executive summary shall include an overview of the major key points and the essence of the recommendations.

8.3 Introduction: Outline of the purpose of the submission, including the terms of reference. The general approach shall be provided. Briefly identify the key issues considered in the submission.

8.4 Analysis and Recommendations: Analyze the subject matter, issue by issue. Each issue shall be included in a separate section and shall be ordered in a logical sequence.

8.5 Citations: All citations in the text shall follow the footnotes format.

8.6 Conclusion: The conclusion drawn following the analysis of the subject matter, shall be listed at the end of the document. The main purpose of the conclusion shall be to propose a solution to the issues discussed.

8.7 Letters: CAPIC submissions that are shorter shall take the form of a professional letter. Letters should always include the intent of writing, the recipient's name and address, and a clear and concise message.

9. THE PREPARATION OF ADVOCACY SUBMISSIONS

9.1 The process of preparing advocacy submissions involves several steps. First, CAPIC's advocacy support staff shall draft a 'Have your Say' announcement, which will be sent to the membership to solicit their input regarding the advocacy subject matter.

9.2 Ensuing the completion of the first step, a submission outline report will be prepared by the responsible staff member, highlighting the vision brought forward based on research results conducted by the responsible staff and input by members.

9.3 The prepared report shall be subject to a review process, wherein it will be scrutinized by Subject Matter Experts (SMEs) for additional input and subsequently submitted to the CAPIC Communications Department for editing and proofreading. Upon finalization of the revisions, the document shall be sent to the relevant immigration body or stakeholder being lobbied or advocated.

9.4 Following CAPIC's participation in an advocacy event, the responsible staff, with input from the attending SMEs, shall draft and release a report to the membership. This document shall include the subject matter discussed during the meeting, the follow-up items, the conclusion drawn, and the milestones achieved. The report shall be rendered accessible to the membership through the IMMeCentre. Furthermore, once it has been uploaded to the IMMeCentre, CAPIC will promptly release an announcement in the next edition of the bi-weekly Newsletter, CAPIC Informs, stating the document's availability.

10. SUBMISSION APPROVAL PROCESS

10.1 CAPIC Members are provided an equal opportunity to contribute and provide input to legislative and policy positions, ensuring that CAPIC submissions reflect the collective position of the membership.

10.2 The approval process below ensures that the submissions are consistent with the CAPIC Mission, Vision and Values.

10.3 The submission may be signed by the CEO of the Corporation.

10.4 Once the submission is approved, it shall be posted publicly.

11. APPOINTMENT OF REPRESENTATIVES

CAPIC representatives attending advocacy events play the primary role of presenting CAPIC members' concerns to stakeholders and reporting feedback to members. As such, representatives must be CAPIC members who have knowledge and skills in the subject matter on the agenda and have the communication and interpersonal relationship skills and diplomacy,

to successfully bring forth issues raised by members with stakeholders. CAPIC representatives must always act in the best interest of CAPIC.

This section of the Policy describes the general selection process of the members attending these meetings. The Advocacy Policy provides process for engaging volunteers for task forces, as necessary.

11.1 During the selection process, the general building principle is to ensure that the members with the most expertise in a particular field are actively selected and if necessary, may be matched with less experienced colleagues for training purposes. There is a developed subject matter expert (SME) list derived from the membership data base with noted experience in specific areas. Appropriate SMEs are selected from the list by CAPIC's operational team and approved by the CEO. Committee members may provide input from time to time as required and review the SME list for expertise.

11.2 The subject matter Experts (SMEs) representing CAPIC shall be the most fitting for the representation and for bringing the concerns to the governmental bodies. The members selected shall receive a copy of the Advocacy Policy and shall familiarize themselves with the CAPIC advocacy process prior to attending the meeting.

11.3 Furthermore, the representatives will provide, prior to attending the meeting, an executed Conflict of Interest declaration and a non-disclosure agreement form and a report of the discussions after the meeting to members through the appropriate forum, if the SMEs have not already completed the required documents.

12. ADVOCACY TOPICS

The Policy Committee and Lobbying Committee, per section 11(f)(iii) and (g)(i) of the Board Policy, will encompass the following subject matter, which may be further subdivided and/or may adopt any such other subject as deemed appropriate from time to time: Statutory issues, Regulatory Issues, Policy issues, Inland Immigration Issues and Overseas Immigration Issues, provincial, municipal and other related immigration and industry matters.

12.1 Issue Identification: Identify key issues affecting the profession through member feedback, industry trends, and regulatory changes.

12.2 Research and Analysis: Conduct thorough research and analysis to develop evidence-based positions and recommendations, leveraging the expertise of SMEs.

12.3 Strategy Development: Develop a comprehensive advocacy strategy, outlining goals, target audiences, key messages, and tactics.

12.4 Implementation: Execute the advocacy strategy through coordinated activities and initiatives, involving SMEs, as necessary.

12.5 Evaluation and Reporting: Regularly evaluate the effectiveness of advocacy activities and report outcomes to the Board and members.

12.6 Ethical Considerations:

- i. Ensure all advocacy activities are conducted ethically and transparently.
- ii. Avoid conflicts of interest and disclose any potential conflicts in advocacy efforts.
- iii. Respect the confidentiality of information and maintain the trust of members and stakeholders.

13. COMPLIANCE AND REVIEW

CAPIC must comply with several key lobbying legislations at both the federal and provincial levels. Below are the primary legislations:

Federal Level

14.1 Lobbying Act (R.S.C., 1985, c. 44 (4th Supp.))

- Overview: This Act governs the activities of lobbyists who communicate with public office holders to influence federal legislative, regulatory, and policy decisions.
- Requirements:
 - o Registration: Lobbyists must register with the Office of the Commissioner of Lobbying of Canada. Unpaid volunteers who lobby non-profit organizations in their volunteering are exempted.

14.2 Ontario Lobbyists Registration Act, 1998 (S.O. 1998, c. 27)

14.3 Québec Lobbying Transparency and Ethics Act (R.S.Q., c. T-11.011)

14.4 British Columbia Lobbyists Registration Act (SBC 2001, c. 42)

14.5 Alberta Lobbyists Act (S.A. 2007, c. L-20.5)

14.6 Manitoba Lobbyists Registration Act (S.M. 2008, c. 42)

14.7 Municipal Level

Certain municipalities, such as the City of Toronto, also have their own lobbying regulations. CAPIC must ensure compliance with these local requirements when lobbying municipal officials.