Canadian Association of
Professional Immigration Consultants

L'Association Canadienne des
Conseillers Professionnels en Immigration

EDUCATION AND TRAINING POLICY
Based on the provisions of CAPIC By-law and Board Policies
AMENDED BY THE BOARD OF DIRECTORS ON [APRIL 18, 2024]

1. INTRODUCTION

Education is one of CAPIC's four pillars and an important component of CAPIC's activities. The purpose of this Policy is to assist, guide and inform parties involved in education and training functions, including seminar planners and supporting staff. In addition to describing what an education event is, this Policy details the responsibilities of those involved in the planning of an education event.

2. SCOPE

This policy applies to all CAPIC education and training activities.

3. EDUCATION EVENT GOALS

The ultimate goal of all CAPIC education events is to enhance the professional knowledge of participants. They are the forum for the exchange of ideas and information on particular topics of relevance to immigration practitioners.

3.1 Education programs and activities should achieve the following:

a) Meet the standards of continuing professional development as established by the regulatory body of Citizenship and Immigration Consultants. Be informative, instructional and educational and designed to meet the needs of practitioners with different experience levels;
b) Emphasize practical instructions or practical knowledge;
c) Vary in content so the CAPIC yearly education plan will cover all major facets of the immigration practice;
d) Be fiscally planned, managed and operated within budget goals while striving to enhance CAPIC's financial well-being;
e) Be aligned within the framework of the CAPIC Strategic Plan; and
f) Evolve with CAPIC's growth and penetration of new markets.

4. EDUCATION EVENT FORMAT AND PARTICIPATION

4.1 Education Committee members and education event organizers are encouraged to consider a range of formats in developing education events, including panel discussions, workshops, and topic-focused information exchanges. Education events generally consist of a small panel of speakers or single speakers, with a moderator, followed by a question-and-answer period involving the audience, although formats are flexible as long as basic education event goals are met. Education events may be held in-person, online or hybrid sessions. Most, but not all, events will have webinar capacity. The webinar or event recordings may be available after each event.

4.2 Members and participants are advised that the materials used in any CAPIC training webinar, seminar, workshop or program may be protected by copyright, and that the

participants may not copy, reproduce, distribute, publish, display, perform, modify, or in any way exploit such content. By doing so, a member could be subject to disciplinary actions, including, but not limited to, suspension or termination of his/her membership in accordance with CAPIC's by-law and policies.

4.3 During the provision of CAPIC education and training activities, Members shall refrain from soliciting other Members for events or services that compete with those of CAPIC.

5. ROLES AND RESPONSIBILITIES

People participate in the development and presentation of education events in several ways. The following list provides definitions of specific roles of the key contributors to a successful CAPIC education event.

5.1 CAPIC Education Team

The CAPIC Education Team includes staff members responsible for developing continuing professional development programs, event logistics and technical support. The Education Team is responsible for working cohesively with the Education and Training Committee in developing, planning, and implementing a national yearly education calendar composed of a variety of education events.

5.1.1 Key responsibilities of the CAPIC Education Team include (but are not limited to) the following:

a) Assist in developing comprehensive and cohesive professional development programs with input from all key stakeholders;
b) Ensure the education program meets industry needs;
c) Submit continuing professional development applications to regulatory bodies and liaise with them to ensure allocated continuing professional development hours and information are posted on the regulator's (CICC) website;
d) Coordinate program delivery to ensure CAPIC achieves the goals as outlined in this Policy and fulfils CAPIC's mandate in education;
e) Liaise with all personnel, including speakers and service providers, to ensure the smooth delivery of programs;
f) Design and conduct advertising campaigns in conjunction with CAPIC's communication team; and
g) Monitor, review and analyze programs, and report to the Education and Training Committee for ongoing improvement

5.1.2 A designated CAPIC staff person will work to perform the following:

a) Book an appropriate venue that meets the event's needs;
b) Arrange for logistics, including taking attendance of participants;
c) Be the in-office coordinator in an event, and liaise with venue officials and suppliers, such as hotel catering staff, when necessary.

5.2 Committee Members

Members of the Education and Training Committee are key contributors to topics and ideas in order that CAPIC education events meet the needs of immigration practitioners, particularly those topics that most interest the local audience.

5.2.1 Committee Members are responsible for the following:

a) Assist in developing comprehensive and cohesive professional development programs for their respective regions, with input from stakeholders, and ensure they are incorporated into the national schedule;
b) Monitor the professional development needs of regional members and practitioners and bring these needs to the attention of the Education and Training Committee and the CAPIC Education Team;
c) Recognize and acknowledge that yearly plans may be amended or changed from time to time depending on industry or legislative changes or the overall needs of the region;
d) Define the goal and content of an education event, with suggested input provided by the CAPIC Education Team;
e) Possibly make the original contact with potential event speakers and then refer the information to the CAPIC Education Team to follow up or contact the speaker directly - Committee members are reminded to use CAPIC as a means of communication when promoting CAPIC events;
f) Together with the CAPIC Education Team, assign time slots for speakers and for question and answer sessions;
g) Together with the CAPIC Education Team, ensure speakers work together to develop a cohesive program or, if speakers intend to present separately, to communicate on major points addressed by each in order to minimize repetition and ensure coverage of all necessary topics;
h) Recommend additional or alternative speakers;
i) Work with event coordinators and organizers to address any areas of weakness and determine how to better structure and describe the proposed event; and
j) Provide post-event feedback and analysis to determine success and options for further improvement.

5.3 On-Site Volunteers

Regardless of the position or title, a volunteer may be delegated the responsibility of the education event coordination.

5.3.1 This person referred to in section 5.4 of this policy above holds the primary responsibility of:

a) Scouting a venue;
b) Liaising with the CAPIC Education Team or other staff member to arrange for logistics, including taking attendance (registration) and reporting attendance to the CAPIC Education Team; and

c) Possibly being the on-site coordinator of an event, liaising with suppliers such as hotel catering staff and technical support when necessary.

5.4 Speakers/Presenters

Presenters or speakers are experts in the topics assigned to them. They are responsible for research on the assigned topic, delivering the content, and keeping their remarks within the designated time limits.

5.4.1 The speaker, upon acceptance of an invitation to speak at a CAPIC event, will undertake the following responsibilities:

a) Sign an undertaking with CAPIC and agree to the terms and conditions of this policy;
b) Provide CAPIC with his/her biography and an official picture at the earliest opportunity to facilitate advertising of the event - it is understood that some speakers may not wish to provide an official photo;
c) Use the provided CAPIC slide templates for their PowerPoint presentation and return the completed presentation in the prescribed format and within the timeframe provided by the CAPIC Education Team - the company name and contact information of the speaker may be added to the first and last page of the PowerPoint presentation;
d) When a panel has multiple speakers addressing the same topic, sometimes they may highlight the same points. To avoid this problem, the CAPIC Education Team will:
    (i) Work with speakers to ensure that varying opinions, strategies, and tips are brought forward on the particular topic to avoid repetition and provide a broad base of knowledge and information to the intended audience, and
    (ii) Have the speakers co-design the program so that they are working together to identify issues to be addressed - at a minimum, speakers shall share with each other the titles and main points they intend to address in their papers/talks to minimise redundancy

e) Acknowledge and understand that CAPIC reserves the right to restrict speakers, panelists, and moderators at its sole discretion; and
f) Acknowledge and understand that they are not financially compensated for participating in CAPIC education events, but that CAPIC may acknowledge their participation by offering tokens of appreciation.

5.5 Hosts and Panel Moderators

The host, as recruited or recommended by the Education and Training Committee in consultation with the CAPIC Education Team, is the person who ensures the smooth delivery of the event on the day of the event and who serves as emcee for a seminar: introduces speakers, enforces time limits, and gives the final closing remarks.

5.5.1 While the host oversees the smooth delivery of the event in its entirety, panel moderators oversee the session of an education event that they are charged to chair. They have the responsibility to call for questions, preview written questions presented by attendees, consolidate similar questions or modify questions when necessary and present questions to the speakers/presenters during panel discussions or question and answer periods. Moderators should monitor the time and, if necessary, call for an end to questions.

5.6 On-site Coordinator for In-Person Events

The on-site coordinator serves as support for the event, taking attendance, calling technical support when necessary and visibly reminding the host of time limits. They also serve as a back–up to the host, enforcing time limits when necessary.

5.6.1 The host and the on-site coordinator roles should NOT be fulfilled by the same person. The host role can be fulfilled by an assigned CAPIC staff member, Education and Training Committee member or senior CAPIC volunteer who is familiar with seminar protocol.

5.7 Technical Support

A CAPIC staff member or an outsourced technical support provider is responsible for providing all necessary audio-visual equipment and the technical support requested by the CAPIC Education Team for any webinar or event. The audio-visual support person must work closely with the webcast technician and establish all logistic requirements for the webinar or event.

6.0 SEMINAR FINANCES

CAPIC operates education events with funds entrusted by members. As such, all parties involved in education events must consider themselves acting in a trust position and should always organize seminars with the members' best interests as their first priority. Processing of education revenue and expenses must be in compliance with CAPIC expense policies.