



Education and Training Policy

Approved May 6, 2015

1. Introduction

CAPIC's Education Committee is responsible for overseeing the educational affairs for the Association. Education is one of CAPIC's four pillars and an important component for CAPIC. The Education Committee has prepared this document to assist, guide and inform prospective Education Committee members, seminar planners and coordinators. In addition to describing what an education event is, it details the responsibilities of those involved in an education event planning, and provides a timetable for the entire process of seminar planning and presentation.

2. Scope

This policy applies to all CAPIC national and chapter educational activities.

3. Committee Members/Composition

The committee shall be chaired by a Director and committee members shall include one representative from each chapter.

4. Education Event Goals

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

Educational programs and activities should achieve the following:

- 4.1. Meet the standards of Continuing Professional Development as established by the regulatory body of Immigration Consultants. Be informative, instructional and educational and designed to meet the needs of practitioners with different experience levels
- 4.2. Emphasize practical instructions or practical knowledge
- 4.3. Vary in content so the CAPIC yearly education plan will cover all major facets of the immigration practice
- 4.4. Be fiscally planned, managed, and operated, within budget goals while striving to enhance CAPIC's financial well-being.
- 4.5 The Education & Training Policy will be aligned within the framework of the CAPIC Strategic Plan



5. Education Event Format

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 exchange. Education events generally consist of a small panel of 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 usually consist of in-person sessions, with usually an online webinar. Most but not all events will have webinar capacity. Recordings may be available.

6. Roles and Responsibilities

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

6.1. Chairperson, Education and Training Committee

CAPIC Bylaws 5.6 g) describes duties of the Chair of the Education and Training Committee (hereinafter the “Education Chair”). Together with the Education and Training Committee, he/she is responsible for overseeing the development of a cohesive yearly national education program for CAPIC and ensures that CAPIC education programs comply with requirements as outlined in Section 4.

6.2 Education Coordinator

The Education Coordinator is responsible for working cohesively with the Education Committee in developing, planning, and implementing a national yearly educational calendar composed of a variety of educational events.

Key responsibilities of the Education Coordinator includes (but not limited to) the following:

- 6.2.1 Assist in developing a comprehensive and cohesive professional development programs with inputs from all key stakeholders
- 6.2.2 Ensure education program meets industry needs
- 6.2.3 Submit CPD applications to regulatory bodies and liaise with them to ensure allocated CPD hours and information are posted on regulator’s website
- 6.2.4 Coordinate program delivery to ensure CAPIC achieve the goals as outlined in this policy and fulfil CAPIC’s mandate in Education.



- 6.2.5 Liaise with all personnel including speakers and service providers to ensure the smooth delivery of programs
- 6.2.6 Design and conduct advertising campaigns
- 6.2.7 Monitor, review and analyze programs, and report to the Education and Training Committee for ongoing improvement

6.3 Chapter Representatives (hereinafter referred to as Committee Members)

Members of the Education and Training Committee are key contributors to topics and ideas so CAPIC educational events meet the needs of immigration practitioners, particularly those topics that interests the local audience the most. Committee Members are responsible for the following:

- 6.3.1 Develop a comprehensive and cohesive professional development programs for their chapter, with input from stakeholders, and ensure it is incorporated into the national schedule.
- 6.3.2 Monitor the professional development needs of chapter members and practitioners and bring these needs to the attention of the Education and Training Committee.
- 6.3.3 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 chapter.
- 6.3.4 Define the goal and content of an educational event, with suggested input provided by the Education Coordinator
- 6.3.5 The Committee Member may make the original contact with potential event speakers and then refer the information to NHQ or the Education Coordinator for further follow up work. NHQ or the Education Coordinator will contact Government speakers directly. Committee members are reminded to use CAPIC means of communication when promoting CAPIC events.
- 6.3.6 Together, with the Education Coordinator, assign time slots for speakers and presenters, question and answer period
- 6.3.7. Together, with the Education Coordinator, 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
- 6.3.8 Recommend additional or alternative speakers
- 6.3.9 Work with event coordinators and organizers to address any areas of weakness and determine how to better structure and describe the proposed event
- 6.3.10 Provide post event feedback and analysis of the event to determine successful and options for further improvement



6.4 Chapter Representative, Event Coordination (Chapter Committee Member)

Some chapters regardless of the position title may have a person who is given the responsibility of the educational event coordination. This person holds primary responsibility of:

6.4.1 Scouting a venue that meets the chapter's needs

6.4.2 To liaise with CAPIC Education Coordinator or other staff member and arrange for logistics including taking attendance (registration) and reporting attendance to the Education Coordinator or other staff member

6.4.3 He or she is the on-site coordinator in a event and liaises with suppliers such as hotel catering staff and technical support when necessary

6.5 Speaker/Presenter

Presenters or Speakers are experts in the topics developed by Chapter Committee Members. Presenters/Speakers are responsible for research on the assigned topic, delivering the content and for keeping their remarks within the designated time limits.

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

6.5.1 Provide CAPIC with his/her biography and an official picture at the earliest opportunity to facilitate advertising of the event. It is understood some presenters may not wish to provide an official photo

6.5.2 Use the provided CAPIC Slide templates for their power point presentation and return the completed presentation in the prescribed format, with the timeframe provided by the Education Coordinator. Company name and contact information of the guest speaker may be added to the first and last page of the power point presentation.

6.5.3 When a panel has multiple speakers addressing the same topic, sometimes they may highlight the same points. To avoid this problem the Education Coordinator /Chapter Committee Member will:

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☐ 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.



☑ Have the speakers co-design the program so that they are working together to identify issues to be addressed. At minimum, have speakers share with each other the titles and main points they intend to address in their papers/talks so that redundancy can be minimized.

6.5.4 Acknowledge and understand that CAPIC reserves the right to restrict speakers, panelists, moderators at its sole discretion.

6.5.5 Speakers and presenters are not financially compensated for participating in CAPIC educational events. CAPIC may acknowledge their participation of offering tokens of appreciation.

6.6 Moderators and Panel Chairs

6.6.1 The Moderator, as recruited or recommended by the Education and Training Committee and in consultation with Education Committee Member 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 oversees the question and answer period.

6.6.2 While the moderator oversees the smooth delivery of the event in its entity, Panel Chairs oversees the session of an educational event that he or she is 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 discussion or Question and Answer period. Moderators should keep an eye on the time, and if necessary call for an end to questions. Moderators and Panel chairs returns all questions to the Education Coordinator at the end of the event.

6.7 On-site Coordinator (Chapter Committee Member)

This person, as designated by the Chapter Committee, serves as support for the event, taking attendance, calling technical support when necessary, and visibly reminding the Moderator of time limits. They serve as a back –up to the Moderator, enforcing time limits when necessary. ***The Moderator and the On-site Coordinator roles should NOT be fulfilled by the same person.*** A CAPIC staff member, where available, should be assigned this task. This person may be another “Committee member” or senior volunteer who is familiar with seminar protocol.



6.8 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 Education Coordinator and/or Events Coordinator. The audio-visual support person must work closely with Webcast technician and establish all logistics requirements that meet the need for a webcast/webinar

6.9 Event Coordinator

A designated staff person will work in conjunction with the Education Coordinator and an Education Committee Member, - to perform the following:

6.9.1 Book an appropriate venue that meets the seminar's needs

6.9.2 Send appropriate registration and sign material to the Chapter Executive prior to an event.

6.9.3 Arrange for logistics including taking attendance (registration) and reporting attendance to the Education Coordinator or other staff

6.9.4 Be the in-office coordinator in a seminar and liaises with suppliers such as hotel catering staff when necessary

6.9.5 Follow up with venue and chapter executive for post seminar issues and review

7.0 Seminar Finances

CAPIC operates educational events with funds entrusted by members. As such, all parties involved in event organization must consider themselves acting in a trust position and should always organize seminars with members' best interests as their first priority.

Processing of education revenue and expenses must be in compliance with CAPIC expense policies.

8 Seminar Development and Preparation Process and Schedule – See Appendix 1



Appendix 1

Seminar and Event Process:

Eight weeks in advance of seminar or an event (Optimal goal):

1. Event Planner discussed and prepared by Education Coordinator in conjunction with Chapter Committee Member should be finalized. This will contain date, time, and theme for the seminar including specific topic for each session. A working agenda should be place.
2. The Venue location should be finalized and as determined by the Staff Event Coordinator and Chapter Committee Member. The information for the venue should be recorded in the Event Planer. Important points to note include important aspects to Venue:
 - a. Location – avoid places that require parking fee (additional cost to members)
 - b. Room Size (# of people it cans seat, in rounds or lecture/theatre style)
 - c. Menu
 - d. AV Support – Wired (for webcast)/Wireless Internet, Speed at least 2 MB
 - e. ***Quotation/Banquet Event Order (BEO) should include:***
 - i. General set up info:
 1. Podium
 2. Tech Table
 3. Panel Table (if applicable)
 4. Rounds (8)/Theatre or Lecture/half rounds (6)
 5. Set up time
 - ii. Room Rental (usually waived when committed to lunch/dinner/meeting package)
 - iii. Food Costs Breakfast (if applicable), Coffee Break(s), Lunch
 - iv. Technical (as part of venue)

AV requirements (where applicable) and costs:

 1. Microphones (how many?) for presenter/panelists;
 2. Screen
 3. Projector
 4. Wireless microphone (at least one)
3. Webcast Provider Quotation (to be obtained by Staff Technical Coordinator) – recording or live webcast + archive – they sometimes provide AV at a lost cost than the hotel – ask the tech guy



4. Budget Preparation (Use Seminar Event Template) and Approval – Usually prepared by Staff

4-6 weeks in advance (Optimal Goal)

5. CPD application – prepared and submitted by Education Coordinator. Speakers should be finalized and if not, ICCRC is notified of any additions or changes.
6. Set Registration Page
7. Promotional Announcements – Constant Contact - checklist
 - a. Use standard seminar event template
 - b. Reminder: update whatever side bars
 - c. Send notices to sponsors too
 - d. Don't forget the count-down process, send every day for the last 5 days
8. Monitor Registration

One to two weeks prior

9. Additional Promotion (on-going in the count down)
10. Report Registration, keep chapter updated
11. Logistics meeting (telephone usually) organized by Education Coordinator with chapter and volunteers (one week in advance); assigning duties (see 22)
 - a. Gifts/thanks for speakers – to be purchased by staff
 - b. Staff Event Coordinator to send to Chapter required sign in/registration/name tags promotion material /thank you gifts as necessary if event not in Ontario (One week prior)

One to Three days prior

12. Print handouts if required
13. Send out final registration names/lists/sign in material by email to Chapter Executive one day before event
14. Receive password and log in from Webcast tech
15. Send PowerPoint to Webcast technician – at least 24 hours prior
16. Send webinar log in – at least 24 hours prior
17. Send materials to all participants – at least 24 hours prior
18. Coordinate with webcast technician about set up – must know set up time
19. Review again staff/volunteers duties – logistic run down must be ready (see 22)
20. Always promote membership plus any other special events (e.g. NEC)
21. Equipment/stationery list for packing – Don't forget:
 - a. name tags
 - b. sign in sheets



- c. Laptop (for PowerPoint)
 - d. Projector (if CAPIC has one)
22. Sign In Sheet Design:
- a. Seminar ID
 - b. Participant Name
 - c. Participant CAPIC ID, ICCRC ID
 - d. Signature
 - e. Sign In time
23. Sign Out Time – optional, check chapter requirement
24. Volunteers/Staff and duties:
- a. 2 to 3 for setting up equipment – only if CAPIC is bringing in AV
 - b. 2 to 3 at registration table – check ID, make sure participants sign in, give out name tags, give handouts – ASSIGN ONE PERSON IN CHARGE OF SIGN IN SHEET to be reported back to NHQ
 - c. 1 to 2 for membership – talk to non-members, recruit them (volunteers can ask to have their names put down on the recruit's application and earn referral discount)
 - d. 2 to 3 for handing out question form during seminar (if using question form);
 - e. 1 to 2 for handing out wireless microphone to “questioners”
 - f. 1 to work with the hotel – monitor food, drinks, changes in break/lunch time, anything ad hoc
 - g. 1 or more hosts/hostesses for speakers – meet at the door, seat them, etc.
 - h. 2 or more ushers – to “shepherd” the crowd back after break/lunch
 - i. 2 to 3 for tear down – take equipment down, bring them back CAPIC/volunteer-in-charge, check room once for “lost and found”

One day to One week after seminar

- 25. Educator Coordinator to coordinate with Chapter to review event and any particular issues regarding educational content or speaker issues; and determine further action is needed
- 26. Education Coordinator to send thank you notices to speaker
- 27. Education Coordinator to forward CPD reporting list to ICCRC
- 28. Staff Event Coordinator to coordinate with Chapter Executive re: any venue issues and determine next steps
- 29. Staff IT Technical support to review any technical issues for educational event and follow up accordingly to ensure corrected for future events



Two weeks after seminar

30. Educator Coordinator to review survey notices (with relevant Chapter Committee Member), and forward positive ones to Communications for posting on website, and to review suggestions form surveys for further improvement