



MEMBER & CANDIDATE AMBASSADOR

Orientation Guide

Table of Contents

- Welcome!.....3**
 - Why Member and Candidate Ambassadors Are Important.....3
 - Characteristics of Good Stories4
 - Questions to help shape your CPA story5
 - Top 10 activities to promote the CPA brand5

- Overview of CPABC, CPAWSB and CPA Canada6**
 - CPABC: The Chartered Professional Accountants of British Columbia6
 - CPAWSB: The CPA Western School of Business6
 - CPA Canada6
 - What is the difference between CPABC and CPAWSB?.....6

- Being a Member and Candidate Ambassador.....7**
 - Member and Candidate Ambassador Requirements.....7
 - Member and Candidate Ambassador Expectations7
 - Types of Recruitment Volunteer Opportunities7
 - How to Sign Up to Become a Member and Candidate Ambassador.....7

- Types of Recruitment Events8**
 - Participating in CPABC Events.....8
 - Recommending Events for CPABC Participation.....8
 - Creating Your Own Event8

- Important Tips on CASL and the Protection of Privacy.....9**
 - Canada’s Anti-Spam Legislation (CASL)9
 - What is a Commercial Electronic Message (CEM)?9
 - What does this mean for me as a Member Ambassador if I want to create my own recruitment event?9



Table of Contents CONTINUED

- Sharing of Private Information.....10**
 - Freedom of Information and Protection of Privacy Act (FOIPPA) 10
 - Definitions..... 10
 - Restrictions on the Capturing of Images 11
 - Special Consideration for Initiatives Involving Minors 11

- Social Media 12**

- CPABC Student Recruitment Team Support 13**

- Additional Resources..... 13**
 - Financial Literacy Sessions 13
 - Getting your Employer Involved 13

- APPENDIX A 14**

- APPENDIX B 15**



Welcome!

Welcome to the CPABC Member and Candidate Ambassador program! CPABC thanks you for volunteering your time and sharing your CPA story with prospective students. With your help, we can inspire and influence future CPAs!

Why Member Ambassadors Are So Important

Member and Candidate Ambassadors play an important part in CPABC's outreach to prospective CPAs because these individuals are keen to hear your CPA career journey. While CPABC staff are well-versed on how to start and succeed in the CPA Professional Education Program (PEP), there is a unique and very important piece that only CPA members and PEP candidates can provide – your story. Prospective students want to know why you chose the CPA designation, the value of the CPA designation to your past and current roles, and the career opportunities it has afforded you. If you also happen to be a CPA member or PEP candidate who has gone/is going through the CPA PEP, prospective students would love to know what your experience was/is like.

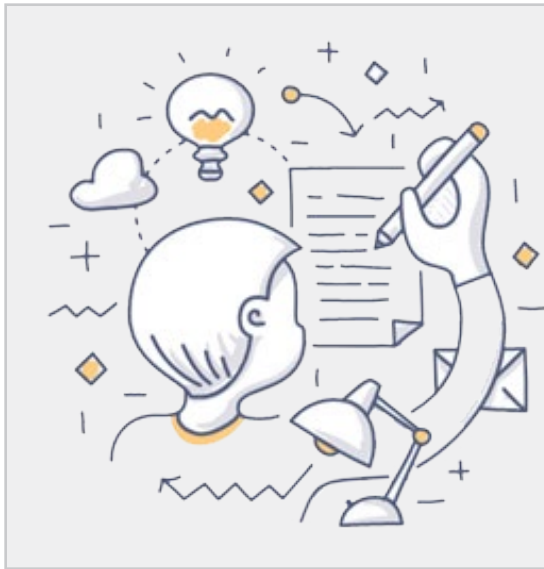
On the following pages, you will find some tips on how and where you can share your CPA story effectively.



CPAs and candidates have an important role!

- ✓ You are the brand
- ✓ You validate the brand's value, attributes and competencies
- ✓ You bring the brand to life every day in your actions and interactions at work, home, and in your communities
- ✓ You tell the story and connect others to it!

Characteristics of Good Stories



- Good stories are not spin
- Good stories are not just about repeating message
- Good stories are more than just a report
- Good stories have a beginning, middle, and end
- Good stories have tension
- Good stories tap into emotion
- Good stories have a point

- **Good stories are not spin.** When you're spinning something, the story loses authenticity. Life is messy. Careers are messy. Maybe you had stops and starts throughout your career. Maybe you struggled to complete the program, or find that promotion that you longed for. Share the good and the bad, the failures and successes. While we ultimately want to share how the CPA designation has added to our career, the journey isn't always smooth. To the extent that you're comfortable, share the ups and the downs.
- **Good stories are not just about repeating messages.** If all someone is doing is repeating a message, they start to sound like nothing more than a messenger and it feels inauthentic, overly rehearsed, and less human.
- **Good stories are more than just a report.** Reports are meant primarily to inform us, but good stories not only inform, they enlighten and inspire. Good stories involve people and their experiences.
- **Good stories have a beginning, middle, and end.** The mood and tone are set at the beginning of a story. The middle may have a series of events, or complications that continue to the story's climax. In the end, conflicts are resolved and loose ends tied up.
- **Good stories have tension.** These are challenges, pitfalls, obstacles or problems that the people experience. Your audience wants to listen until the tension is resolved. And the vast majority of the time it is resolved.
- **Good stories tap into emotion.** They don't just get us to think, they also get us to feel. And when we feel something as well as think something, that story makes a greater impact and sticks with us.
- **Good stories have a point.** There is a lesson, realization, or idea that you want the audience to take away from your story. The moral to your story, as it were.

Questions to help shape your CPA story

- What inspired you to become a CPA?
- What have you found the most surprising on your CPA journey?
- Did you face significant challenges along the way? How did you work through it?
- Did you have a mentor, colleague, friend, etc., who helped you through your journey?
- What did they do that meant the most to you?
- What does being/becoming a CPA mean to you?
- As a CPA or a PEP candidate, how do you add value to your organization?
- What would people find surprising about your role?

Top 10 activities to promote the CPA brand

- 1** Wear your CPA with pride! (If you are a Member, do you have the CPA pin? If not, contact Sharon Hummel, Manager, Student Recruitment, shummel@bccpa.ca).
- 2** Influence a young person thinking of becoming a CPA: Be a mentor, or be a source of information on CPA education options and career benefits.
- 3** If you are in a hiring position, seek out CPAs; put “CPA preferred” on job ads.
- 4** Social media: Follow us on [Instagram](#), [LinkedIn](#), [Facebook](#), [Twitter](#), and [TikTok](#)! Share our stories with your network.
- 5** Volunteer as a CPA or PEP candidate in your community; share your breadth of skills.
- 6** Take part in local social engagements and share your CPA story with your community.
- 7** Tell your own story: Discuss your career successes and how you’ve made a difference by making your organization successful.
- 8** Share your story at CPABC’s recruitment events by contacting recruitment@bccpa.ca.
- 9** Ask your CPA peers to tell their CPA story!
- 10** Attend [CPABC events](#) organized by the Student Recruitment and Employer Relations team.

Overview of CPABC, CPAWSB and CPA Canada

CPABC: The Chartered Professional Accountants of British Columbia

The Chartered Professional Accountants of British Columbia (CPABC) is the training, governing, and regulatory body for over 38,000 CPA members and 6,000 CPA candidates and students.

CPABC carries out its primary mission to protect the public by enforcing the highest professional and ethical standards and contributing to the advancement of public policy.

CPAWSB: The CPA Western School of Business

The CPA Western School of Business (CPAWSB) oversees the education of candidates enrolled in the CPA Professional Education Program (CPA PEP) in the four western provinces and in the Northwest Territories, Yukon, and Nunavut. While prospective students may take the preparatory courses (pre-requisites) through either CPAWSB or at any of the 25 post-secondary institutions in BC, the CPA PEP is only provided through CPAWSB.

CPA Canada

Each provincial CPA body is a member organization of the Chartered Professional Accountants of Canada (CPA Canada), which represents more than 210,000 designated professional accountants across the country and around the world.

CPA Canada's mandate includes the creation of national-based policy, marketing, and research initiatives, as well as setting the national standard for learning outcomes and competencies that all new CPAs should possess during and after completion of the CPA PEP. Likewise, CPA Canada creates and marks the Common Final Exam (CFE).

What is the difference between CPABC and CPAWSB?

CPABC and CPAWSB are two different organizations who work closely together. CPABC is responsible for recruiting future CPAs (high school students, post-secondary students, internationally educated/trained prospects, and career changers). This is achieved through the activities of CPABC's Student Recruitment Team, which include: advising, holding information sessions, hosting and participating in events, and event sponsorships to increase awareness of the CPA designation. Once a prospective student enrolls in the CPA PEP, they become a student/candidate with CPAWSB.

Being a Member Ambassador

Member Ambassador Requirements

- Designated member in good standing or CPA candidate enrolled in CPA PEP
- Passionate about being a CPA and open to sharing your career journey
- Willing to stay abreast of CPA program changes

Please confirm you are a member in good standing by completing [Appendix B](#) and emailing the form to ambassadors@bccpa.ca

Member Ambassador Expectations

- Completion of the [CPA Program Overview presentation](#) (eligible for 1 CPD hour)
- No minimum time commitment – contribute as much time as you wish
- Keep us informed if you participate in any recruitment activities by emailing ambassadors@bccpa.ca so that we can keep track of Member Ambassador participation for reporting purposes

Types of Recruitment Volunteer Opportunities

Member and Candidate Ambassadors have the opportunity to engage with a diverse group of individuals. Opportunities include:

- Representing CPABC at career fairs
- Serving as a panelist or speaker at sponsorship events
- Speaking to prospective students at networking events
- Speaking to students at high school and post-secondary information sessions
- Judging business case competitions (i.e. CPABC's Annual Business Case Competition)

How to Sign Up to Become a Member and Candidate Ambassador

If you know someone who would make a great ambassador, encourage them to sign up [here](#). This form allows participants to select the audience(s) they are most interested in connecting with, including:

- High school students
- Post-secondary students
- Workforce professionals and career changers
- Newcomers

Member and Candidate Ambassadors receive a quarterly newsletter and will be the first to know of any events and initiatives put on by CPABC.

There is no minimum time commitment and Member and Candidate Ambassadors can withdraw from the program any time by contacting ambassadors@bccpa.ca.

Types of Recruitment Events

Participating in CPABC Events

There are various ways to find out about CPABC events:

- All Member and Candidate Ambassadors receive a quarterly e-newsletter with upcoming volunteer opportunities and information about how to participate.
- As Member and Candidate Ambassadors have indicated the audience and type of event they are interested in, the Student Recruitment Team may reach out to Member and Candidate Ambassadors individually when an event comes up that aligns with their interest.
- A listing of all Student Recruitment and Employer Relations events can be found on our Information Sessions and Events [webpage](#). If there are events that you are interested in, please email ambassadors@bccpa.ca.

Recommending Events for CPABC Participation

If you have been invited to attend or participate in an event as a CPA member or PEP candidate, or if there is an event that you think CPABC's Student Recruitment Team should participate in, please email ambassadors@bccpa.ca with the event details and we will take it from there. Examples of events could be:

- Career fairs at a local high school
- Career fairs at your local college or university
- Networking events in your community
- Guest speaking opportunities
- Career fairs for working professionals or newcomers

Creating Your Own Event

If there is an event that you would like to organize yourself, we would love to help, and if possible, attend!

Please email ambassadors@bccpa.ca with your event idea and target audience (high school students, post-secondary students, career changers, internationally educated/trained, or all audiences) and a staff member will get back to you to discuss collaboration. If possible, we would appreciate four weeks lead time to ensure we can provide adequate support and resources (brochures, swag items, etc.). For members that do not live in the Lower Mainland, the more advance notice we receive, the better, in case we need to post items, send materials or plan for travel.

Important Tips on CASL and the Protection of Privacy

Canada's Anti-Spam Legislation (CASL)

CASL has been in force since 2014 and applies to businesses and not-for-profit organizations carrying out electronic communications in the course of their activities. CASL requires express or implied consent from the recipient to receive your commercial electronic messages (CEM). CPABC Member and Candidate Ambassadors may want to do outreach via email and as a representative of CPABC, it is critical that if the email is a CEM, that it follows CASL compliance. Failure to comply with CASL could result in administrative monetary penalties of up to \$10 million per violation for corporations and up to \$1 million per violation for individuals.

What is a Commercial Electronic Message (CEM)?

A CEM is an electronic message that encourages participation in a Commercial Activity, even if it is sent without an expectation of a sale or profit. For example, a message promoting a free PD session, or a non-CEM message with a tagline referring to a Commercial Activity or that offers an incentive to participate in an activity would be a CEM. CEMs are not just bulk electronic messages – it can be an email sent to even a single person. Electronic messages include messages sent to an electronic address by email, instant messaging, telephone (text), push notification, or any similar account.

What does this mean for me as a Member or Candidate Ambassador if I want to create my own recruitment event?

CPABC staff have all been trained on the restrictions and protocols of CASL. If you have an idea or opportunity to create a recruitment event that is not organized by CPABC, please call or email us at ambassadors@bccpa.ca and we'll be happy to walk you through the ways that you can invite participants that abide by CASL requirements.

Sharing of Private Information

CPABC is committed to protecting the confidential nature of non-public information and respecting the privacy rights of individuals whose information is in CPABC's custody and control and has created a privacy policy to enforce this commitment.

The purpose of this policy is to fulfill CPABC's privacy commitment and to:

- Ensure privacy compliance with the Chartered Professional Accountants Act (the CPA Act) and Freedom of Information and Protection of Privacy Act (FOIPPA);
- Reduce the organization's liability and risk due to inappropriate handling of confidential information; and
- Protect CPABC's reputation.

Freedom of Information and Protection of Privacy Act (FOIPPA)

CPABC is subject to FOIPPA by virtue of it being a governing body of a profession. In compliance with FOIPPA, CPABC is obligated to prevent the unauthorized collection, use, or disclosure of personal information; and to give individuals with respect to their own personal information, and the public a right of access to records as appropriate.

This privacy policy applies to all employees of CPABC (whether permanent, temporary, or contract employees), volunteers, officers, directors, and third party service providers, including contractors.

It is CPABC's policy to protect the confidential nature of non-public information and respect the privacy rights of individuals whose information is in CPABC's custody and control.

Definitions

- **Confidential information** Any non-public information pertaining to CPABC's business and includes personal information.
- **Contact information** Defined by FOIPPA as: "information to enable an individual at a place of business to be contacted and includes the name, position name or title, business telephone number, business address, business email or business fax number of the individual."
- **Personal information** Defined by FOIPPA as: "recorded information about an identifiable individual other than contact information."

If you have questions on CASL or CPABC's Privacy Policy, please contact Sharon Hummel, Manager, Student Recruitment, shummel@bccpa.ca.

Restrictions on the Capturing of Images

If Member and Candidate Ambassadors are hosting an event with photography, it is important that during the registration process, registrants acknowledge their understanding that photographs may be taken at the event for use by the organizers and CPABC in various publications, including on social media.

Tip Include disclaimer signage (please see [Appendix A](#)) that Member and Candidate Ambassadors can use for their events. If an attendee does not want their photograph taken, ensure the photographer is aware of this so no photos of the attendee are published.

Tip Use a different coloured lanyard or tag for any individuals that don't wish to have their image published. This allows both the photographer and person posting on social media to easily identify images that should not be published.

Special Consideration for Initiatives Involving Minors

If Member and Candidate Ambassadors are hosting an event or activity with attendees under the age of 19, they will require the attendees' parental consent. CPABC can provide agreement and release forms in which the parent/guardian provides their permission for the attendee's participation and, if applicable, permission to publish the attendee's image in CPABC media.

Attendees will need to submit a signed copy of the form by email to the organizers (cc'ing Sharon Hummel, Manager, Student Recruitment, shummel@bccpa.ca for record keeping purposes) in advance of their participation by email. Attendees under the age of 19 who are unable to provide a signed copy of the parental consent form are not allowed to participate in the event or activity. Please contact Sharon Hummel for the parental consent form.

Social Media

Follow, engage, and share CPABC's content with your network:

Instagram www.instagram.com/cpabc

LinkedIn www.linkedin.com/company/cpabritishcolumbia/

Facebook www.facebook.com/cpabc

Twitter www.twitter.com/cpa_bc

Twitter <https://www.tiktok.com/@cpabc>

You are welcome to post your CPA-related activity under your social media handle and tag CPABC (#CPABC). Some guidelines to follow:

- Tag CPABC's social media channels where possible. For example, posting at CPABC events, promoting upcoming CPABC events or projects, and sharing CPABC's content. E.g. Twitter: "At the @CPA_BC #Convocation! Ready to cheer for all the new grads!"
- Use your best judgment when posting material to ensure it is neither inappropriate nor harmful to CPABC, its members, or the profession.
- Exercise caution when posting and tagging photos of members, candidates, and students at events. Always ask for permission.

If you have any questions regarding CPABC's social media policy, please contact Sharon Hummel, Manager, Student Recruitment, shummel@bccpa.ca.

CPABC Student Recruitment Team Support

As a Member and Candidate Ambassador, you have the CPABC Student Recruitment Team to support you. Never hesitate to reach out to us.

Our service commitment:

- Two-day response to emails; and
- Same-day response to telephone calls.

Contact information

Sharon Hummel

Manager, Student Recruitment

shummel@bccpa.ca

Chartered Professional Accountants of British Columbia

800-555 West Hastings Street, Vancouver, BC V6B 4N6

T. 604 629 8360 C. 604 377 0469

Additional Resources

Financial Literacy Sessions

CPA Canada delivers financial literacy workshops provided for free in local communities to targeted audiences. If you have any questions, please contact our Financial Literacy team at finlit@bccpa.ca.

Getting your Employer Involved

The CPABC Employer Network is free for employers and includes complimentary access to the resumé database and a 25% discount on [job posting plans](#) on the [CPABC Careers Site](#), in addition to invitations to participate in CPABC's recruitment and industry events (including CPABC Career Week and other opportunities to network and mingle with students, candidates and other CPAs). If you're keen on being kept in the loop about CPABC recruitment events, you are invited to sign up [here](#).

APPENDIX A

To protect the likeness of participants during events, please use the following Photo Advisory Notice during events



PHOTO ADVISORY

As part of our coverage of CPABC events, participants may be photographed and or quoted with or without attribution.

If you object to being photographed, please let a CPABC Member and Candidate Ambassador know.

Thank you,
CPABC Member and Candidate Ambassadors

Chartered Professional Accountants
of British Columbia

APPENDIX B



Chartered Professional Accountants of British Columbia
800-555 West Hastings Street Vancouver BC CANADA V6B 4N6
T. 604 872.7222 F. 604 681.1523 TF. 1 800 663.2677
www.bccpa.ca

PERSONAL DECLARATION RETURN for CPABC Presenters and Volunteers

The information requested on this form is collected under the authority of Section 26(c) of the *Freedom of Information and Protection of Privacy Act*, for the purpose of administering the *Chartered Professional Accountants Act*, SBC 2015, c.1, and assessing any potential risks facing you and/or the Organization as a presenter or volunteer. If you have any questions about the collection of this information, contact the Freedom of Information and Privacy Officer of CPABC, Stella Lam, CPA, CA, Vice President Membership Regulation and Privacy Officer.

NAME: _____

1. Do you have sufficient subject matter expertise to effectively fulfill the proposed role as presenter or volunteer? No Yes
2. Are you aware of any facts or matters relevant to the performance of your duties as a presenter or volunteer which, if publicly disclosed, could reasonably be expected to hinder your ability to perform those duties, or to cause CPABC reputational risk? No Yes

Factors to consider include, but are not limited to:

- o Any current or past disciplinary action from any professional organization or regulatory body
- o Any past or current CPABC or other regulatory body complaint
- o Any charges under any criminal law in any jurisdiction
- o Any bankruptcy or insolvency filings or actions
- o Any current or past investigations into personal or professional misconduct

CERTIFICATION

I, the undersigned, hereby certify that the foregoing statements are true, correct and complete to the best of my knowledge, information and belief and hereby undertake to notify CPABC immediately in writing of any material change to the statements made above. I understand that CPABC may also request additional information from me. I am aware that CPA members have duties and obligations under the *Chartered Professional Accountants Act*, CPABC's Bylaws and CPABC Code of Professional Conduct, and I agree to be bound by these policies if I am a CPA member.

SIGNATURE: _____ DATE SIGNED: _____

Private and Confidential