

Roundtable
Guidelines and Timelines
March 2017

CPHR

CHARTERED PROFESSIONALS
IN HUMAN RESOURCES

**British Columbia
& Yukon**

TABLE OF CONTENTS

Overview

| | |
|----------------------------|---|
| Who Attends _____ | 1 |
| Leading a Roundtable _____ | 1 |
| Sponsorship _____ | 1 |

Guidelines

| | |
|---|---|
| Determining the needs, purpose and audience of a roundtable _____ | 2 |
|---|---|

Format Options

| | |
|--------------------------------|---|
| HR Challenge _____ | 3 |
| Case Study _____ | 3 |
| Guest Facilitator _____ | 4 |
| News of the Day _____ | 4 |
| Building a Business Case _____ | 4 |
| Process Review _____ | 4 |

Timelines and Responsibilities

| | |
|--------------------------------------|---|
| Review – July _____ | 5 |
| Plan – August _____ | 5 |
| Implement – September to June | |
| Information and Promotion _____ | 5 |
| The Day Before Your Roundtable _____ | 5 |
| The Day of Your Roundtable _____ | 6 |
| After the Roundtable _____ | 6 |

Administration and Resources

| | |
|--|---|
| Continuing Professional Development Credit _____ | 7 |
| Logistics _____ | 7 |
| Leader Commitment _____ | 7 |
| Resources _____ | 9 |

Appendixes

| | |
|---|----|
| A: CPHR BC & YK Social Media Channels _____ | 10 |
| B: CPHR BC & YK Regional Offices _____ | 11 |
| c: Sample Confidentiality Agreement _____ | 12 |

OVERVIEW

CPHR BC & YK roundtables are peer-learning events where participants are both teachers and learners.

A roundtable leader establishes the purpose, intended audience, and logistics based on a variety of options, including area of practice, industry, or geographical segmentation.

WHO ATTENDS?

Participation in a roundtable has a number of benefits, including learning and networking and Professional Members earn Continued Professional Development (CPD) hours towards their CPHR designation.

Roundtables are a benefit of membership and free for CPHR BC & YK members to attend. For the majority of the roundtables, non-members may attend for a fee of \$20 (plus GST), some roundtables are Members Only. For a listing of roundtables, contacts and other relevant information please refer to Current Roundtables. Alternatively, please visit the CPHR BC & YK online calendar.

STARTING OR LEADING A CPHR BC & YK ROUNDTABLE?

As a member of CPHR BC & YK you could fill a leadership role for an existing roundtable or create a new one based on an identified need. Your first point of contact will be your Member Relations Manager. If it is a new roundtable, please review the roundtable process and submit a synopsis of your idea.

BENEFITS OF LEADING A ROUNDTABLE

- Exhibit leadership in your HR community.
- Increase your exposure as an HR professional.
- Earn Continuing Professional Development credit.

SPONSORSHIP

Roundtables are an attractive way to expose your brand to professionals in an intimate setting. Please contact the Member Relations Manager for the applicable Region to further explore these opportunities.

GUIDELINES

Roundtables are established to meet a variety of member needs. They provide an opportunity for groups of HR practitioners to come together around a topic of interest, area of practice or shared geography to share and learn from each other. Roundtables can be held on a quarterly, bi-monthly or monthly basis, and this will be agreed upon by the Member Relations Manager and the Roundtable Lead.

For a roundtable to be viable, a member in good standing must commit to take a leadership role to facilitate and organize the roundtables for a full calendar year (September to June). Success is also contingent upon active interaction and participation among roundtable participants. Roundtables are a gathering of peers who share experiences and knowledge to build community, so it is critical that those in attendance also play an active role in the generation of subjects to discuss.

- 1. Consider the learning needs in your region**
 - a. What are the big things that will impact our local economy in the coming twelve months?
 - b. What will this mean for business and HR practitioners in our region?
 - c. What are the key topics that HR practitioners need to explore together to better understand their opportunities and options?
 - d. What specific practice areas could gather to share information?
- 2. Define the roundtable topic/purpose for gathering**
 - a. What is bringing this group of practitioners together?
 - b. How is it relevant to HR practitioners in my region?
 - c. Identify the target audience for this roundtable (e.g. emerging, mid-level, senior and/or practice area).
- 3. Review the relevance of the topic/reason for gathering**
 - a. The topic/purpose reflects a need of HR practitioners in the area.
 - b. The topic/purpose relates to a current area where people practicing HR have questions.
 - c. The topic/purpose is not competing with other CPHR BC & YK events.
 - d. The topic is clearly defined – HR practitioners will understand why the need is relevant to them.
- 4. Determine where and when the roundtable will be held**
 - a. Consider member board rooms, libraries, community boardrooms etc.

If you are interested in starting a new roundtable, submit an idea, summarizing points 1 through 4 above to your Member Relations Manager.

When a roundtable leader of a current roundtable steps down and there is no successor, a volunteer posting will appear in your regional newsletter.

ROUNDTABLE FORMAT OPTIONS

Roundtables provide an opportunity for groups of HR practitioners to come together around a topic of interest to discuss and learn from each other. This document is intended to outline a number of facilitation techniques that roundtable leaders and participants can use to leverage the expertise of the group while enhancing learning opportunities for all participants.

Roundtables are not intended to replace professional development workshops hosted by CPHR BC & YK or our member's offerings. The focus is on peer to peer learning and as such, any presentation made must be NOT LONGER THAN 20 MINUTES IN LENGTH and the remaining time is participants working/learning together in facilitated discussion.

HR CHALLENGE – TROUBLESHOOTING THE ISSUES WE FACE

To provide either a roundtable member or perhaps a not-for-profit facing a current HR challenge with the opportunity to present their challenge to a room of HR practitioners who will work together to provide a potential solution. The person with the HR challenge would:

- Provide some background information about their organization;
- Present the HR challenge (often best in advance);
- Respond to questions from the roundtable regarding the challenge;
- Discuss potential solutions to the challenge as a group. If the group is large, this could also be done by breaking the group into smaller pods and having each pod present their solution to the overall group at the end of the roundtable.

CASE STUDY – LESSONS LEARNED

In this case, a member of the roundtable presents a case study, outlining the following:

- Business description;
- Business challenge;
- Potential solutions;
- Solution selected;
- What worked well vs. what didn't work well; and
- Lessons learned.

This format can engage the audience by:

- Allowing for a short presentation, followed by a group discussion regarding things such as similar situations and how to potentially respond, etc.
- Allowing the person presenting the case study to generate discussion throughout the case study prior to revealing the steps taken by the organization (e.g. what are some potential solutions? What solution would you have chosen and why? What challenges would you foresee? What would you have done to address these challenges?).

GUEST FACILITATOR

In this case, someone with a specific area of expertise or unique experience is brought in to either:

- Provide a short presentation (maximum 20 minutes) sharing their topic/experience, which is then followed by a facilitated discussion;
- Ask for questions related to a topic of interest and address them throughout the roundtable, engaging other members of the roundtable to also offer their thoughts, opinions, and experiences.
- Please work with any guest facilitators you decide to use to assist them to narrow their topics and reinforce length of their time, allowing time for participant interaction while stressing the desire to avoid sales pitches.

NEWS OF THE DAY

How Current Events and Research Impact HR Practices in Our Organizations

Every day the stories in our newspapers impact the way that we do business. While they may not always be as obvious as changes to the minimum wage, there are always people practice implications. Consider how the Stanley Cup riots brought to light questions about the legal implications of organizations firing those seen rioting in pictures, bullying in the workplace, EAP support for employees that were trapped in vandalized business, how to staff for future events, video monitoring, etc. Take a news story, or a piece of recently released research and:

- Provide an overview of the news story or what happened (circulate in advance if possible);
- Discuss the implications for HR;
- Discuss what this means for the group members in terms of how they do business.

BUILDING A BUSINESS CASE

In this case, a member of the roundtable presents an HR initiative that they are struggling to obtain approval of, presentation and discussion is focused on:

- An overview of the HR initiative – presenting the case and then responding to questions;
- Discussing the key elements of the business case – looking at the issue from multiple perspectives (may choose to assign people to play the roles of CEO, COO, CFO, etc.);
- Discuss key strategies for gaining buy-in.

PROCESS REVIEW

In this case, members of the roundtable discuss a system or process in their organization (e.g., a performance management system), they may even bring in examples of forms or policies to support their explanations, and the group discusses:

- What works well with the systems they have;
- What doesn't work and potential opportunities to improve;
- Best practices that they can take from one another.

ROUNDTABLE TIMELINES, ROLES & RESPONSIBILITIES

Roundtable Leaders work with the Member Relations Manager in their region to ensure maximum exposure and participation for roundtables.

JULY – REVIEW

- Member Relations Manager sends a short survey to all people who have attended the roundtable to ask for feedback and input.
- Roundtable Leader and MRM review: feedback, roundtable purpose and goals, and previous year's attendance lists to determine relevance and value and determine viability for upcoming operating year.
- Review existing description for [roundtable](#) and update/revise if necessary.

AUGUST – PLAN

- Identify dates and book locations for roundtables to be held for the upcoming operating year (September to June) and provide to your Member Relations Manager, or assigned CPHR BC & YK staff, for posting and promoting. Consider the suggested formats for a roundtable, including discussion, presentation, and or case study (see Roundtable Format Options).
- Receive a package from your Member Relations Manager that includes updated promotional materials, printed registration forms, thank you cards etc. Throughout the year, please advise if you need this replenished.

SEPTEMBER TO JUNE - IMPLEMENT

PROVIDE ACCURATE INFORMATION SIX WEEKS IN ADVANCE on location/ speakers using the provided link. Ensure that your Member Relations Manager has the appropriate information for posting and promotion – via the link provided to you.

- When the roundtable is posted, your CPHR BC & YK staff resource person will send you the URL to review – once approved it is recommended that you **SHARE THIS IN YOUR NETWORKS**. Some suggestions are:
 - Post in your LinkedIn, Facebook and Twitter – see page 10 for CPHR BC & YK Social channels.
 - Post on external event forums (eg. NetworkinginVan.com)
 - Share in your newsletter
 - Use in the footer of your email signature

THE DAY PRIOR TO YOUR SCHEDULED ROUNDTABLE

- A representative of CPHR BC & YK will provide you with:
 - *A list of all those who have registered for a particular session.* In the case where you have an ongoing FULL roundtable and a known waiting list, you may wish to request email addresses as well as names and send a reminder as the Roundtable Lead to ensure everyone is coming and make space for waitlisted participants. NOTE: A Confidentiality Agreement must be signed and on file if this is occurring.
 - *A link to Key Speaking Notes* which you are asked to announce and review to promote ongoing initiatives within CPHR BC & YK.

- Prepare your Materials
 - Print a copy of the registration list to bring with you to the roundtable to take attendance, required for CPD hours (see note below). You may also bring a laptop and do this 'live'.
 - Print or bookmark the Key Speaking notes
 - Print any promotional materials that have been provided to you by your MRM.
 - Handwrite a thank you card for the facilitator.

THE DAY OF THE ROUNDTABLE

- Arrive 30 minutes in advance to ensure that everyone arriving feels welcome, including your guest facilitator.
- If there is limited access to the building your roundtable is held in post a sign with contact details on the door.
- Greet attendees, and check them off on your registration list.
 - In the comments column indicate yes or no, if they attended
 - Attendees who have not pre-registered may stay provided there is 1) space and 2) they pay the non-member rate, when applicable. Add them to the bottom of the spreadsheet. Ask them to pre-register next time. NOTE: CPHR members must register themselves online by the end of the day (if not pre-registered) in order for their profile to record their attendance for CPD hours.
- Introduce yourself and thank the host (venue) of the roundtable.
- Announce any upcoming events in your region - Networking Events, other PD, mentoring application deadlines, award nomination deadlines etc. from the Key Speaking Notes to cross promote and create awareness of other association activities and benefits.
- Thank the sponsor (where applicable) of the roundtable, and if they are present, provide them an opportunity to address the group (2 to 3 minutes).
- Introduce the session/topic and facilitate the roundtable.
- Thank everyone for attending and thank your guest facilitator (if applicable).
- Announce the next date/topic etc. for your roundtable.
- Tidy up the space that you have used for your roundtable, and leave it as you found it (or better).

AFTER THE ROUNDTABLE

We suggest that you keep a folder for your registration lists for the year, as well as make any notes that you feel are relevant for the planning phase in July. Some questions you can ask yourself after each roundtable are:

- What worked well?
- What could be improved?
- Knowing what I know now, what will I do differently next time?
- Is there anything left undone from this event? (and then do it ☺)

Advise your MRM if you need additional promotional materials.

ADMINISTRATION AND FREQUENTLY ASKED QUESTIONS

- **CONTINUING PROFESSIONAL DEVELOPMENT CREDIT**

(apply one, but not both, depending on your situation):

- **Chair/Co-Chair of an HR Committee Outside Current Employer (B8)**
For a period of no less than a year and/or a minimum of 24 hours per year including meetings and meeting preparation. Must be able to demonstrate responsibilities for completing project work and/or leading sub-committees. This includes chapter/regional/executive level involvement. 15 points per year, per committee.
- **Seminars/Workshops/Conferences/Roundtables (D5)**
Participation in seminars, workshops, conferences, roundtables – online or in person, offered internally or externally. This includes chapter/regional seminars, breakfast meetings or dinner speakers with educational components. One point per hour to a maximum of 10 points per day.

- **LOGISTICS:** To keep the running of roundtables simple and low cost:

- Food and beverage are not provided.
- Audio Visual available if supplied by the venue, yourself or another participant.
- Handouts are not produced or reimbursed for. If the facilitator or other participant wants to produce handouts/materials they may do this on a volunteer basis.
- Pre and Post Event Emails – no pre or post emails are sent from CPHR BC & YK (other than the confirmation the participant receives upon registration). In the case where a guest facilitator is present and offers to send a follow up copy of slides it is their responsibility to collect contact information and adhere to CASL legislation.
- Travel Funds – CPHR BC & YK does not provide reimbursement for roundtable participation or presentation.
- Venues – it is strongly recommended that roundtables will be held at a venue where there is no charge for use; suggest contacting libraries, credit unions, police departments or others who may have a community board room available. These venues can be recognized for their contribution in the posting.
- Gifts – no gifts are given to sponsor locations or facilitators, these organizations/individuals who are members will be recognized at annual volunteer recognition. Locations and facilitators are shared through our broad distribution via email and receive great exposure.

- **COMMITMENT.** You will be listed as the main contact person for the roundtable on the CPHR BC & YK website, please ensure that you have provided current contact information to your Member Relations Manager. The site will list your name and email.

While each roundtable leader's commitment may vary based on circumstances, the following is intended as a guideline for active participation:

- Arrange and lead roundtables from September to June. Where you are unable to lead in person find and orient a suitable member volunteer.
- Respond to email and information on Roundtable business in a timely manner.
- Inform MRM of any extended absences.
- Ensure own contact data is current in CPHR BC & YK database.

CPHR BC & YK is grateful for the efforts and contributions of all volunteers. It is recognized that work and personal demands can change over time. If commitments change, Roundtable leaders are encouraged to request assistance or withdraw from the lead position during times when he/she is unable to meet the expectations of the role. Should any volunteer find it difficult to meet commitments, they are asked to speak with their MRM as quickly as possible to explore mutually acceptable solutions. Frank and honest communication can prevent misunderstandings or missed deadlines from occurring. As a team, we are committed to meeting the needs of the regional members.

Stepping Down as Roundtable Leader

When it's time to step away from leading the roundtable, you must notify your MRM as soon as you have made the decision. Together you will find a replacement volunteer to lead the roundtable. If you have someone in mind, who has been attending on a regular basis you can bring this name forward for discussion with your MRM who will give approval and put the mechanisms into place to make the transition. For a seamless transition, it is preferable that your term as a Roundtable Leader extend the season of September to June but should you have to step away earlier, please attempt to give at least one month's notice.

- **CONFIDENTIALITY.** As a Roundtable Leader you may have access to confidential member information. You will be required to sign a CPHR BC & YK Volunteer Confidentiality Agreement.

ROUNDTABLE LEADER RESOURCES

PHYSICAL RESOURCES

The following will be provided to you by your Member Relations Manager in August of each calendar year.

- Blank registration forms
- CPHR BC & YK promotional material – including packages for non-member
- CPHR BC & YK blank thank you cards
- CPHR BC & YK Member Relations Manager business cards

During the year you may receive PDF copies of one page brochures for upcoming initiatives that you will be asked to print and bring with you (eg. Mentoring, Awards etc.).

ELECTRONIC RESOURCES

Your MRM will provide you with Region specific links to:

- Roundtable Posting Template: This is the document used to provide information to your MRM on date/location/topic for each roundtable. It is to be completed six weeks in advance of the roundtable.
- Key Speaking Notes – Your MRM will provide a link to updated notes for you to reference in your introductory and concluding comments.
- Roundtable Participant Feedback – sent each June to attendees of the roundtable and results will be discussed in your July meeting.

APPENDIX A: CPHR BC & YK SOCIAL MEDIA CHANNELS

Here's how you can help!

The three main things you can do are SHARE ~ COMMENT ~ RE-POST/RE-TWEET. You may also share things you have found that you think might be interesting /relevant with your MRM, so the MRM can pass it along to CPHR BC & YK staff to post for the Association.

MRM Weekly Newsletter: When you receive the weekly newsletter from your MRM (each Thursday), read and make note of upcoming events and items of interest in your region and for the overall association. If there is something of interest to someone you know, forward the newsletter to them with a comment and perhaps invite them to attend an event with you.

LinkedIn: Join the CPHR BC & YK LinkedIn group <https://www.linkedin.com/groups/71802> and participate in conversations, shared articles of interest, comment and like on items that have been posted. Share events in your region, or other relevant information.

Facebook – Like and follow the CPHR BC & YK page - <https://www.facebook.com/CPHRBC/> – set it up to receive notifications from the page so you don't miss anything. Look for photos from events that you have attended, and tag friends that you know in the photos. Comment or share posts about upcoming events.

Twitter - <https://twitter.com/cphrbc> - re-tweet, 'favourite' and/or reply to @cphrbc tweets. Note if you are sharing an article from the HRVoice tag with @cphrbc and #hrvoice so that our head office sees.

Instagram – <http://www.instagram.com/cphrbc>

YouTube - <https://www.youtube.com/user/BCHRMA>

- Comment and like videos shared on our YouTube channel.

Social media is about raising CPHR BC & YK's profile as *the* source of HR information.

Also reference our [Social Media Policies](#).

APPENDIX B: CPHR BC & YK OFFICES

CPHR BC & YK Vancouver

Coastal Vancouver, Fraser Valley and Greater Vancouver Regions
1101 – 1111 West Hastings Street
Vancouver, BC V6E 2J3

Lower Mainland & Fraser Valley MRM: Quinne Davie qdavey@cphrbc.ca 604.694.6942

CPHR BC & YK Victoria

Vancouver Island
Box 30247, Reynolds RPO
Victoria, BC V8X 5E1

Vancouver Island MRM: Carlyne Taylor ctaylor@cphrbc.ca 250.479.4235

CPHR BC & YK Kelowna

Southern Interior, Central Interior and North Regions
1100 - 1631 Dickson Ave, Kelowna BC V1Y 0B5.

Southern and Central Interior and North MRM: Tim Read tread@cphrbc.ca 250 317 8344

CPHR BC & YK Yukon

277 Moraine Drive,
Whitehorse, Yukon, Y1A 0E5

Yukon MRM: Rita Koeller, CPHR rkoeller@cphrbc.ca 867.332.4102

APPENDIX C: CONFIDENTIALITY AGREEMENT

Between: Chartered Professional in Human Resources British Columbia and Yukon
1101 – 1111 West Hastings Street Vancouver, BC V6E 2J3
(hereinafter referred to as “CPHR BC & YK”)

And: _____
(hereinafter referred to as the “CPHR BC & YK Volunteer”)

Whereas the CPHR BC & YK Volunteer shall from time to time assist CPHR BC & YK with the provision of services to CPHR BC & YK’s members and customers and CPHR BC & YK shall provide contact and other information, including personal information, regarding its members and customers to the CPHR BC & YK Volunteer in order to make such assistance possible;

Now therefore the aforementioned parties hereby agree as follows:

1. That the CPHR BC & YK Volunteer shall comply fully with the provisions of the Personal Information Protection Act of British Columbia.
2. That the CPHR BC & YK Volunteer shall read Schedule 1 to this agreement and sign where appropriate to signify their understanding of the principles of personal privacy protection.
3. That the information, including both home or work contact information, provided to or collected by the CPHR BC & YK Volunteer is not to be used for any purpose other than providing services on behalf of CPHR BC & YK to CPHR BC & YK’s members and customers.
4. That the information collected by or provided to the CPHR BC & YK Volunteer shall not be communicated or disclosed in any manner beyond what is required to provide the services contemplated in this agreement. If any disclosure to any third party is required in order to provide such services, such disclosure shall not be made without the express consent of CPHR BC & YK. Disclosure to any third party cannot be made unless and until such third party has signed a Confidentiality Agreement with CPHR BC & YK.
5. That if CPHR BC & YK advises the CPHR BC & YK Volunteer that a CPHR BC & YK member or customer has withdrawn their consent for the use of their personal information, that the CPHR BC & YK Volunteer must immediately stop using the personal information for that purpose.
6. That the CPHR BC & YK Volunteer must protect personal information by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure, copying, modification or disposal.
7. That if there is an unauthorized disclosure of personal information that the CPHR BC & YK Volunteer must immediately advise CPHR BC & YK of the unauthorized disclosure and the nature and scope of the disclosure and assist CPHR BC & YK to recover the lost data and to notify any individuals whose data has been disclosed or lost.
8. That CPHR BC & YK shall have the right to pursue all legal remedies for any loss or harm sustained by CPHR BC & YK due to the failure of the CPHR BC & YK Volunteer to comply with the provisions of this agreement.
9. The laws of the Province of British Columbia and the Yukon shall apply to this Agreement and the courts of British Columbia and the Yukon shall have exclusive jurisdiction.
10. The term of this agreement shall be equal to the tenure of the CPHR BC & YK Volunteer on the Advisory Council.
11. Upon expiration of this agreement, the CPHR BC & YK Volunteer must return all contact and other information, including personal information, regarding CPHR BC & YK’s members and other customers to CPHR BC & YK. If return is not possible due to the nature of the information, then the information must be destroyed in such manner that it cannot be recovered in any manner whatsoever.

As the **CPHR BC & YK Volunteer**, I hereby accept the terms and conditions of this Agreement and acknowledge that I have read and understood the **Ten Principles for the Protection of Privacy**, attached as Schedule 1 to this agreement.