

Canada's Anti-Spam Legislation (CASL) Annual Training Plan

Purpose

PEO has 500+ volunteers dispersed amongst 36 chapters. Using Campaigner, each chapter can send out notices to the membership and these notices can be regulatory (non-commercial) as well as commercial in nature. It is important that PEO and all its chapters be seen to respect the CASL requirements that are in effect.

Compliance Training plan

Chapters are the responsibility of the PEO Chapter Office. Thus, the training for CASL compliance will be handled by the Chapter Office staff. To ensure all chapters be seen to respect the CASL requirements that are in effect, the following compliance training plan will be in effect starting fiscal 2018.

Chapters typically hold their election during the first quarter of the calendar year. After election, there may be new volunteers joining the chapter board. These volunteers could be taking on leadership and/or communication roles at the chapter and need to be aware of CASL and its ramifications. Thus, PEO will provide training to those that volunteer for the organization at the chapter level as follows:

Action	When	Frequency, location	Attendees
Reminder: Self-directed review of the CASL training documents	Month of February	At the February round of regional congress, remind Chapters delegates to ask everyone on the chapter board to review the CASL training documents	Anyone on the chapter board
Training: Annual CASL training	End of April	Once yearly at the end of April, organized by the PEO Chapter Office to provide training session at PEO AGM	Chapter delegates in attendance at AGM
Teleconference Training: Annual May CASL teleconference training	May (perhaps third Wednesday during lunch hour)	Mid May teleconference training for CASL. All chapter delegates encourage to join. The distribution of this training notice will go to the officers of each chapter	Officers of each chapter as there may not be a person readily identifiable as the "communications" person

Logic of the Compliance Plan

The chapter office is proposing three training sessions for all chapters annually. There are no plans on making these mandatory but we will be encouraging the volunteers to get familiar with CASL. The training will take place during February, April and May of every year.

A mention during the February round of regional congress may serve as an initial memento to all chapter delegates that they must ask whomever is responsible with communications to review CASL thoroughly. This training is self-directed. The chapter office is available to answer any questions.

The Annual CASL training session is a face-to-face training session on CASL specifically to be held annually at the AGM Chapter Executive Training in April. The benefit of this training is that we have 2 hours of contact time to discuss CASL and other pertinent material to ensure retention. There will be no cost for the face-to-face meeting as the volunteers are already there attending the PEO AGM. However, this training is only open to those attending the AGM. Not everyone volunteering on a chapter board can attend the PEO AGM, especially for those Chapters that are not near the GTA or the AGM and that are out of town.

For those Chapters executives that we did not catch at the April AGM Chapter Executive Training and those that are not located in the GTA, the chapter office will offer a teleconference training session. This training will be a maximum of 1 hour held during lunchtime to ensure better attendance. The month of May is a good time of the year as most chapters have had their AGM and allow for one board meeting for the chapters to organize themselves.

Documentation available

Item	What is it?	What is its use?	Where to find it?
CASL – Chapter Training	PowerPoint slide deck posted for self-guided review of the latest Chapter Training material for CASL	Self-directed training material PEO training material	Chapters.peo.on.ca website under Documents A-Z
CASL – Guidelines for Chapters	Written by our lawyer and reviewed by PEO staff, this guide simplifies the language for our volunteers to understand CASL	Self-directed guide for review	Chapters.peo.on.ca website under Documents A-Z
CASL – Express Consent Template	Taken from the back of the “CASL - Guidelines for Chapters”, this is the express consent form the chapter may choose to use to collect express consents	Material is available as needed by chapter volunteers	Chapters.peo.on.ca website under Documents A-Z