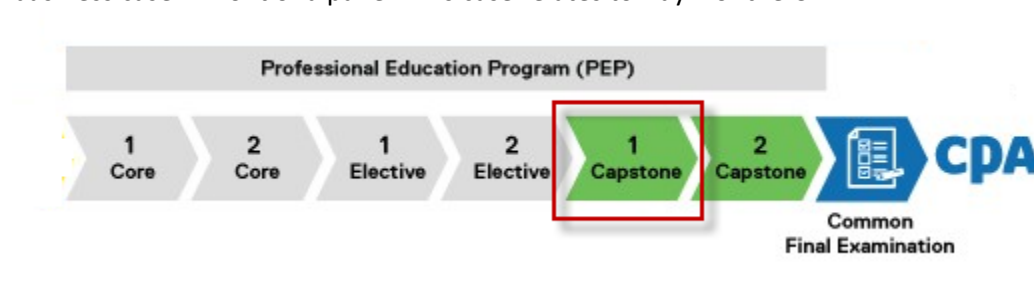


Capstone 1 Mock Panel Guide

This document will provide you with the information required to hold effective Capstone 1 mock panels for CPA candidates.

Capstone 1

Capstone 1 is a module in the CPA Professional Education Program (CPA PEP) designed to allow candidates to demonstrate what they have learned through the Core and Elective modules of CPA PEP and is part of candidates' preparation for the Common Final Exam (CFE). Throughout Capstone 1, candidates work on a large business case in a small group and finish the module by presenting the business case in front of a panel. This case relates to Day 1 of the CFE.



Benefits of Mock Panels

Candidates benefit from mock panel presentations when preparing for the Capstone 1 final presentation as the mock presentation allow groups to practice and receive constructive feedback before presenting to the Capstone 1 evaluation panel. Candidates who have participated in mock panels have found that they provide an opportunity to improve on their overall presentation, including content and presentation style.

Mock panels also provide CPA members the opportunity to develop stronger relationships with candidates and to give back to the CPA profession.

Things to Consider

To facilitate planning a mock panel, consider the following best practices based on the experiences of other chapters who have already conducted these panels for candidates.

1. Plan ahead

Capstone 1 is typically held four months before the CFE. In 2018 and 2019, the CFE will be offered in September, so Capstone 1 will take place in May and June, with the panels taking place in late June and early July. The CPA Western School of Business (CPAWSB) [publishes the module schedule on the CPAWSB website](#) with specific Capstone 1 module and panel dates.

2. Booking space

Chapters offering mock panels will need to find locations and volunteers to participate in the panels. Appropriate locations include library conference rooms or office board rooms. Availability of public spaces may be limited; consider booking the space well in advance of offering the panel.

3. Hold the panels early in the session

Plan to hold the mock panels as early as possible and at least 1-2 weeks before the actual Capstone 1 presentations. This is to give the candidates time to revise their presentations where recommended and to practice further. Candidates who have previously participated in mock panels found that when the panels that are held too late (for example, only a few days before the scheduled presentations), the group does not have enough time to make revisions or practice any changes. This also gives the chapters an opportunity to secure additional mock presentation spaces based on demand.

*If you would like the **CPAWSB/CPABC** to send an [email invitation](#) to the candidates on your behalf, please send a request to outreach@cpawsb.ca as early as possible, preferably before the start of Capstone 1.*

4. Finding volunteers

To find volunteer mock panelists, chapters have had success by [emailing their members \(see sample email text in Appendix 3\)](#), using social media, and contacting chapter members directly. Mock panelists should have a CPA designation and have some familiarity with the panel format. It is recommended (whenever possible) that chapters identify a lead volunteer who has had previous experience participating in a Capstone 1 panel to provide guidance to the other volunteers.

5. The CPA marking guide for Capstone 1 presentations

The CPA marking guide for Capstone 1 presentations will be provided to the mock panelists in advance once it is available. The panelists should provide feedback on the group's presentation skills rather than content i.e. are they engaging the audience, did they appear confident presenting the material, did the supporting material enhance their presentation etc.?

6. Mock panel scheduling

Each mock panel timeslot should be scheduled for 90 minutes. The candidate presentation should be approximately 60 minutes long in order to give the volunteers enough time to provide constructive feedback and to allow approximately 10-15 minutes between each group so volunteers can prepare for the next group, take a break, etc.

Chapters that cover larger geographic areas should consider holding panels in different locations to help more groups attend since group members can be spread out geographically.

Support

CPABC and **CPAWSB** can aid the local chapters by:

- Providing Capstone 1 enrollment numbers for your area to assist in planning.
- Sending communications to Capstone 1 candidates inviting them to participate in mock panels on behalf of the chapter (*Please note: candidate information such as names and email addresses cannot be shared by CPAWSB or the CPABC to the chapters for privacy reasons*).
- Share materials relevant to the Capstone 1 panels (example: panel marking guide)

Questions can be directed to the CPAWSB Outreach team: outreach@cpawsb.ca.

Resources

Capstone 1 cases (includes current and past cases)	https://www.cpacanada.ca/en/become-a-cpa/cpa-professional-education-program-becoming-a-cpa/cpa-professional-education-program-capstone-modules/capstone-1-evaluation-example
CPAWSB module schedule	http://www.cpawsb.ca/cpa-pep/schedule
CPABC website	www.bccpa.ca
CPAWSB Outreach Team	outreach@cpawsb.ca

Appendix 1: Checklist

Arranging a mock panel takes time and planning to provide the best experience for the members participating as panelists and the candidates delivering the presentations. The following steps should be started at least 3-6 months prior to the start of Capstone 1

- ✓ [Review CPAWSB module schedule](#) and note the Capstone 1 enrollment deadline, module start date, presentation dates
- ✓ [Begin searching for an appropriate venue](#). Things to consider: AV capability, enough presentation space, availability (mock panels should be held at least one week prior to the scheduled panel), etc.
- ✓ [Reach out](#) to potential volunteers
- ✓ [Prepare communications](#) to be sent to the candidates
- ✓ [Reach out to your \[CPA Province\] or the CPAWSB Outreach](#) team for module enrollment numbers/Capstone 1 materials

Appendix 2: Candidate Communication Templates

If using a survey to determine candidate interest and contact information

Dear Capstone 1 Candidate,

[CPAWSB] is sending this message to you as a resident in the area served by the **[insert chapter name]** Chapter. The Chapter offers its congratulations for arriving at the Capstone 1 Board Presentation milestone.

We would also like to let you know that local Chapter professionals have volunteered to form a mock board/boards to provide interested groups with an opportunity to practice presentation and Q&A skills and receive feedback on their presentations in a setting that approximates the actual event.

The Chapter has arranged for mock board presentations on the evening of **[insert dates and location]**. Be prepared to bring any equipment necessary to make your presentation or a suitable alternative to a live PowerPoint presentation (i.e. print outs of the slides, etc.).

If your group is interested in taking advantage of this opportunity, please complete the survey below. The personal information you share in the survey will be provided to the Chapter to arrange the presentations.

[insert link here]

Someone from the Chapter will reach out during the module, so please designate a group member for the Chapter to communicate with regarding the mock board(s).

Note: The **[insert chapter name]** is a separate entity from CPA **[insert province]** and CPAWSB and the personal information you provide will be disclosed to the Chapter so a representative can make arrangements for this project.

If the candidates will be contacting a specific member or email address

Hello,

CPAWSB is sending this message to you as a resident in the area served by the CPA **[insert province and chapter name]**. The Chapter offers its congratulations for arriving at the Capstone 1 Board Presentation milestone.

We would also like to let you know that local Chapter professionals have volunteered to form a mock board to provide interested Capstone 1 groups with an opportunity to practice presentation and Q&A skills and receive feedback on their presentations in a setting that approximates the actual event.

The volunteers are available for mock board presentations each day on **[insert date(s)]** during the following time slots:

- Session 1: **[insert time]**
- Session 2: **[insert time]**

- Session 3: **[insert time]**

If your group is interested in taking advantage of this opportunity, please designate one team member to email **[insert name and/or email address]** with the following information:

- 1) the names of your group members; and
- 2) your first and second choices for day and time.

A Chapter representative will reach out to the designated group member to make the necessary arrangements and confirm the location. Be prepared to bring any equipment necessary to make your presentation or a suitable alternative to a live PowerPoint presentation (i.e. print outs of the slides, etc.).

Note: The **[insert chapter name]** is a separate entity from CPA **[insert province]** and CPAWSB and the personal information you provide will be disclosed to the Chapter so a representative can make arrangements for this project.

Appendix 3: Member/Volunteer communication templates

Email to recruit volunteers

Subject: Volunteers for Capstone 1 Mock Panels

Hello,

The **[insert chapter name]** is working to facilitate mock panels for current CPA candidates in the Capstone 1 module of the CPA Professional Education Program (CPA PEP) and we are looking for volunteers to participate.

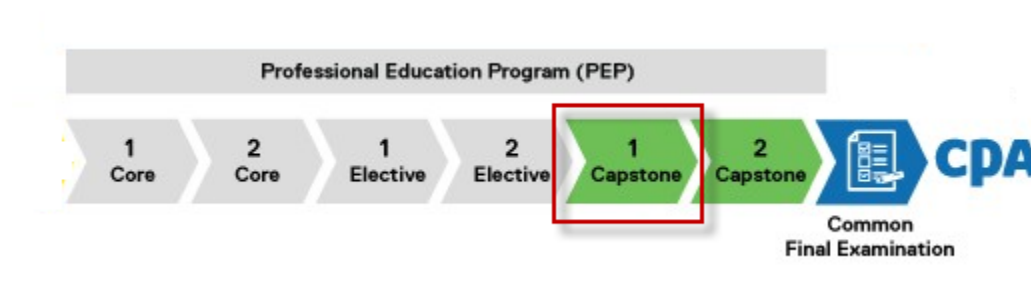
The mock panels are planned for **[insert date(s) here]** at **[insert location]**.

If you are interested in volunteering to participate as a panel member, please provide your contact information and the dates you are available to attend in the following survey link:

[insert survey link here]

Information about Capstone 1

Capstone 1 is designed to allow candidates to demonstrate what they have learned throughout the Core and Elective modules in CPA PEP and is part of candidates' preparation for the Common Final Exam (CFE). Throughout the module, candidates work on a large business case in a group and to finish the module, they present the business case in front of a panel. This case relates to Day 1 of the CFE.



The **[insert chapter name]** is a separate entity from the CPA Western School of Business (CPAWSB) and CPA **[insert province]** and that they are providing their personal information to the local Chapter for the purpose of facilitating this project.

Survey to collect volunteer information

The **[insert chapter name]** is working to facilitate mock panels for current CPA candidates in the Capstone 1 module of the CPA Professional Education Program (CPA PEP) and we are looking for volunteers to participate.

We would appreciate if you would fill out the following survey and indicate the dates you will be available to participate in the mock panel.

Thank you for your support!

Question 1: What is your role?

- A) CPA member
- B) CPA member volunteer (Volunteers on the local chapter board)

Question 2: What is your familiarity with Capstone 1?

- A) Completed Capstone 1 as a CPA PEP candidate
- B) Previously taken part as a legacy designation/Capstone 1 board member
- C) No previous experience

Question 3: Which **[insert chapter name]** region is near your location?

- A) [insert region/city]
- B) [insert region/city]
- C) [insert region/city]
- D) [insert region/city]

Question 4: Please indicate which of the following dates you will be available:

- A) Date/Time #1
- B) Date/Time #2
- C) Date/Time #3
- D) Date/Time #4

Question 5: Please provide your preferred email for contact regarding this event:

Name: _____

Email: _____

Thank you for completing this survey! A chapter representative will contact you at the provided email address to confirm your availability.