

## OTHER TEMPLATES

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## BANK/FINANCIAL INSTITUTION SURVEY

Thank you for participating in the (Agency name here) RESP Sign-up Event. We would like to track how many RESPs were opened and how many participants engaged with you. Please fill out this form as accurately as possible throughout the event.

Representative Names \_\_\_\_\_

Financial Institution Name \_\_\_\_\_

Contact Details \_\_\_\_\_

### Participant Tracking

Type of interaction	Please tick <input checked="" type="checkbox"/> once per RESP or inquiry
RESP Opening	
Follow-up appointment	
Information Only	
Other: list all options	

Please list all the reasons clients were not able to open up an RESP? (i.e.- didn't have documents, bank not able to open accounts onsite, etc.)

Evaluation (to be filled out at the end of event)

1. Overall, rate how valuable did you find the RESP Sign-Up Event? (1= poor, 5= excellent)

1      2      3      4      5

2. What did you like about participating in the event?

3. How could your experience have been improved?

4. Would you like to be contacted to participate in future RESP Sign-Up Events?

5. Please add any further comments here

## EVENT OVERVIEW

[LOGO(s)]

[AGENCY] Sign Up Event

[DATE]

[TIME]

[LOCATION]

Key Contact Information		
Main Contact	[Name]	[Phone];[Email]
Secondary Contact	[Name]	[Phone];[Email]

### Overview of the event

Text [Quick overview of event, including purpose and goal]

### Logistics

Text [Information about the space, set-up time, technology access, etc.]

### Onsite Partners

Text [Information about which partners will be attending and what they are contributing to the event]

### Additional Information

Text[Event/agency specific information that can be added as needed]

## RESP SIGN UP EVENT TASK LIST

### Day of Preparation

<p><b>[Task]</b></p> <ul style="list-style-type: none"> <li>- <i>[description]</i></li> <li>- <i>[description]</i></li> <li>- <i>[description]</i></li> </ul>	<p><b>[Responsible]</b></p> <ol style="list-style-type: none"> <li>1. <i>[staff/volunteer name]</i></li> <li>2. <i>[staff/volunteer name]</i></li> </ol>
<p><b>[Task]</b></p> <ul style="list-style-type: none"> <li>- <i>[description]</i></li> <li>- <i>[description]</i></li> <li>- <i>[description]</i></li> </ul>	<p><b>[Responsible]</b></p> <ol style="list-style-type: none"> <li>1. <i>[staff/volunteer name]</i></li> <li>2. <i>[staff/volunteer name]</i></li> </ol>

### Pre-event Roles and Spaces

<p><b>[Role/Space Name]</b></p> <ul style="list-style-type: none"> <li>- <i>[description of role]</i></li> <li>- <i>[description of role]</i></li> </ul>	<p><b>[Responsible]</b></p> <ol style="list-style-type: none"> <li>1. <i>[staff/volunteer name]</i></li> <li>2. <i>[staff/volunteer name]</i></li> </ol>
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Event Delivery

<p>[Role/Space Name]</p> <ul style="list-style-type: none"><li>- <i>[description of role]</i></li><li>- <i>[description of role]</i></li></ul>	<p><b>[Responsible]</b></p> <ol style="list-style-type: none"><li>1. <i>[staff/volunteer name]</i></li><li>2. <i>[staff/volunteer name]</i></li></ol>
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## FINANCIAL LITERACY INVITATION LETTER

[LOGO(s)]

[DATE]

[Addressee Information]

[Addressee Information]

[Addressee Information]

[Greeting]

As part of Financial Literacy Month (November) and Education Savings Week (November 15-21, 2020), [AGENCY], is working alongside other members of the Aspire Calgary Education Savings Community of Practice to help lower income families enroll in the Canada Learning Bond (CLB). We warmly invite you to participate in our upcoming event:

[EVENT INFORMATION]

This event is a one-stop-shop for parents to not only get information about government money that is available for their children's education, but also to choose where they would like to open an RESP and to do so on the spot. This event is family friendly as participants can drop in to open an RESP at any time during the hours the event is open.

There is no cost to your Financial Institution to participate in this event. We will provide [LIST OF MATERIALS AND WIFI CONNECTION]. Please bring promotional materials to decorate your booth and arrive at least 30 minutes before the event is scheduled to start. As the purpose of the event is to allow parents to open RESPs on the spot, please ensure you can do this either through mobile account set-up or by bringing hard copies of RESP application forms.

RESP events are run as a community service; for families living on low incomes to receive the Canada Learning Bond (a free government bond of \$500-\$2,000). As RESPs can be open with a balance of \$0 and no financial contribution needs to be made to get the Canada Learning Bond, we know that you will not be expecting parents to contribute their own money.

This is a great opportunity for you to build relationships with both existing and new customers, as well as serve your community in a multigenerational approach to poverty reduction. Please let me know as soon as possible if you can participate in this event, with the deadline of [DEADLINE DATE FOR RESPONSE]. If you cannot attend this event, it would be greatly appreciated if you pass along the invitation to your colleagues. Many thanks for your collaboration and we look forward to working with you.

[Salutation]

[Signature]

[LOGO(s)]

## RESP REPORT

### [Event Name] [Year] Canada Learning Bond Sign-Up Event Report

The information in this report will help the Canada Education Savings Program better support other organizations who may also wish to organize a Canada Learning Bond sign-up events or other types of promotional activities. We appreciate your feedback.

How many families or individuals attended the sign-up event(s)?	
How many RESPs were opened?	
How many CLB requests were made?	
How many [Agency] applications were completed?	
How many Social Insurance Numbers were issued?	
Did you invite Promoters to participate at your event? If so, what was their response?	
What were the busiest hours of your event(s)?	
Did you have what you needed to run your event(s)? If not, what was missing?	
Did you create promotional materials that you can share?	
Do you have photos, anecdotes or testimonials that you can share?	
Do you have a separate event report that you can share?	

Thank You!

## RESP SIGN-UP EVENT WORKSHOP REMINDERS

### RESP SIGN UP EVENT [Year]

#### WORKSHOP REMINDERS

- 1) Use the 15 minutes wisely (max 20 minutes, if needed), focusing only on the salient points about RESP (10 minutes presentation, 5 minutes question-answer).
  - a. Please emphasize they don't have to put in money to open RESP accounts.
  - b. That it is optional to make contributions; if they do, they would get matching money from the government (CESG) based on income.
- 2) Explain the steps found in the Event Guide (copy is given to them at the registration table). Remind participants to keep their Event Guide, complete it after they are done with the bank and drop it off at the exit table (same table where registration is).
- 3) Distribute one (1) copy each family of the following:
  - a. CLB – Get \$500 for your child's future
  - b. Three Steps to Open an RESP (point out back page – Questions to Ask your RESP Provider [they can ask these questions to the bank])
  - c. Quick Reference Sheet. [For example: SmartSaver – 2017 Quick Reference Sheet]
  - d. Personal Info for RESP Application [From a Specific Agency]
- 4) Ask participants if anyone has any language barrier (address this barrier, if possible).
- 5) Distribute one (1) copy per family of the [Agency] application form and ask them to complete it. It has to be completed before online registration. Explain why they need to go through the process of registering online in [Agency] (\$[Amount] gift card per eligible child that opens a RESP account will be mailed to them by [Agency] in the next 2-3 weeks.
- 6) Remind participants where to head when there's an emergency (use the main door for exit; location of washrooms already mentioned to them by registration table).
- 7) Snacks and water will be placed in the workshop room. Distribute to participants before they are led to the [Agency] room.
- 8) Bring those needing SIN for kids to Service Canada (be sure they have the kid's birth certificate and PR card/landing papers ready).



## CHECKLIST FOR RESP SIGN-UP EVENT

### CHECKLIST – ORGANIZING AN RESP SIGN-UP EVENT

TIPS	TASKS
Hone your knowledge of the Government of Canada education savings incentives	<input type="checkbox"/> Visit <a href="http://www.canlearn.ca">www.canlearn.ca</a> to find out more about CLB and CESG. <input type="checkbox"/> Apply for a password to have access to the Canada Education Savings Program’s Champions Network Toolkit: <a href="http://www.canlearnpro.ca">www.canlearnpro.ca</a> . <input type="checkbox"/> Consult the coaching tool in the Champion’s Toolkit on <a href="http://www.canlearnpro.ca">www.canlearnpro.ca</a> . <input type="checkbox"/> Train your staff, volunteers and partners to make sure that they have a good understanding of the incentives.
Determine who you are targeting	<input type="checkbox"/> Target audience: <input type="checkbox"/> Audience needs:
Look for partners and volunteers	<input type="checkbox"/> Possible partners:
Duration and Timing	<input type="checkbox"/> Date of the event: <input type="checkbox"/> Duration of the event: <input type="checkbox"/> Location of the event (name, address and phone number of the contact person):
Invite your local financial institution (FI) to the event	<input type="checkbox"/> Contact FI managers: ability to open RESPs on the spot, etc. <input type="checkbox"/> FI Requirements:
Enlist the support of Service Canada (SC)	<input type="checkbox"/> Contact the Service Canada Centre (SCC): <input type="checkbox"/> SCC Requirements:
Promote your event	<input type="checkbox"/> Create and display flyer/ poster <input type="checkbox"/> Press releases <input type="checkbox"/> Publicity <input type="checkbox"/> Champion(s) <input type="checkbox"/> Local agencies <input type="checkbox"/> Other promotion possibilities.
Preparation	<input type="checkbox"/> Identify ways to recruit participants <input type="checkbox"/> Spread invitations in your area <input type="checkbox"/> Create an invitation list and follow-up with the names on your list <input type="checkbox"/> Incentives for participants: local business support; snacks and beverages <input type="checkbox"/> Set-up of location <input type="checkbox"/> Child minding.