

# Welcome!

- Thank you for joining the webinar on **How to successfully deliver virtual financial education workshops** hosted by Prosper Canada.
- The presentation will begin shortly. (Audio will begin when the presentation starts)

## Technology Details:

- For technical assistance, please call GoToWebinar support line **1-855-352-9002**.
- Participants should connect using VOIP. Please check that the volume is turned up on your computer.
- If dial in option is required, please dial in as follows:
  - Tel (Canada): **+1 (647) 497-9385**
  - Access Code: **581-742-705**
  - Toll free option not available

# Webinar logistics

- **Audience members have all been put on “mute”** for this webinar
- Please **share any questions you have using the “Question box”** (located in the control panel at the right side of your screen).
- You’ll find a few **handouts** you can download and refer to during the presentation (located in the control panel at the right side of your screen)
- **We will share webinar slides with all participants and post a recording** of the session within a few days.



## Land acknowledgement

## Prosper Canada – Who we are

**Founded in 1986, Prosper Canada is a national charity dedicated to expanding economic opportunity for Canadians living in poverty** through program and policy innovation.

**The Prosper Canada Centre for Financial Literacy** works with government, business and community partners to improve the financial knowledge and well-being of vulnerable Canadians by expanding their access to quality financial information, education and counselling.

Prosper Canada's programming in financial literacy and financial coaching is part of the work of the **Centre**, which is co-founded and supported by **TD Bank Group**.





# 1. Introductions: Our panel



Fatima Esmail  
Financial Empowerment  
Facilitator  
Momentum, Calgary  
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Millie Acuna  
Manager, Asset Building  
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SEED Winnipeg  
[millie@seedwinnipeg.ca](mailto:millie@seedwinnipeg.ca)



Glenna Harris  
Prosper Canada  
[gharris](mailto:gharris@prospercanada.org)  
[@prospercanada.org](mailto:gharris@prospercanada.org)

# Today's presentation (1:00-2:00 ET)

1. **Welcome and introduction**
2. **Virtual workshop considerations**
3. **Our speakers**
  - Fatima Esmail (Momentum, Calgary, AB)
  - Millie Acuna (SEED Winnipeg, MB)
4. **Q&A**

## We'd love to hear more about you!

- Have you delivered virtual workshops before?
  - Yes, regularly
  - Yes, but just once or twice
  - Not yet, but we plan to start
  - No
- What are you most curious to learn more about?
  - Outreach before the workshop
  - How to organize the event, attendees
  - How to engage learners virtually
  - How to develop virtual learning activities
  - Other

# Virtual workshop considerations

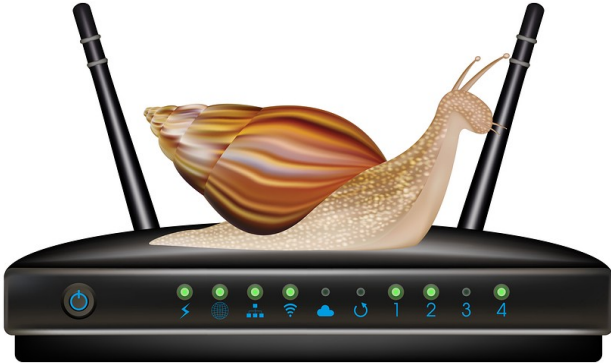
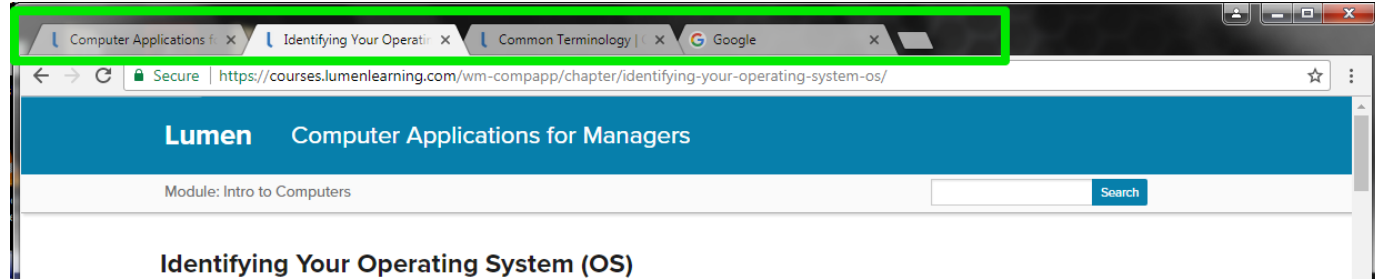
- Ensure your own workshop design is informed by:
  - **Adult learning principles:**
    - Different styles; Ability to engage; Ability to apply learning; Review needs
  - **Audience:**
    - Age, accessibility needs, technological literacy, language, meeting time
  - **Program delivery needs**
    - Workshop content, frequency, program targets, evaluation needs
  - **Technology needs and wants**
    - Multiple platform options available: Teams, Google Meet, Zoom, GoToMeeting, Adobe Connect
  - **Resources available**
    - Staff capacity, guest speakers, technology support

# Momentum

Virtual Workshops Best Practices Guide  
We will start shortly



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# TECHNICAL DIFFICULTIES

can even surpass the mighty power of the dark side

# Technology Newbie

# Housekeeping

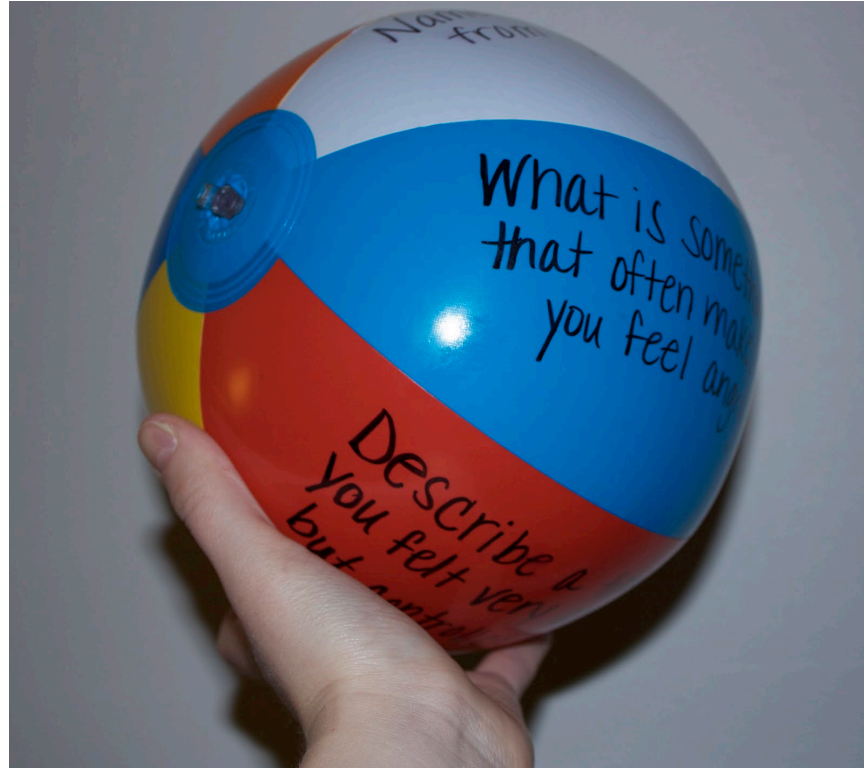
- Workshop from 1pm to 4pm with breaks every 50 minutes. Timer setup.
- Please **Mute** yourselves during the presentation section.
- Keep your camera and mic on for discussion & engagement sections.
- Questions? Ask questions, remember to **Unmute** yourself. Ask questions & interact using the **Chat** section.

# Fatima E



- Facilitator of RESP Training & StartSmart Program, Chair Education Savings Community of Practice & Working Group
- Worked for Momentum for 11 years
- I enjoy getting outdoors, learning a new skill, bread baker, and I am a bookworm.







[Back to Countdown](#)

[Super Fullscreen](#)

www.online-stopwatch.com

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Start

Clear

<https://www.online-stopwatch.com/countdown/>



## Voorbeeld Breakout rooms

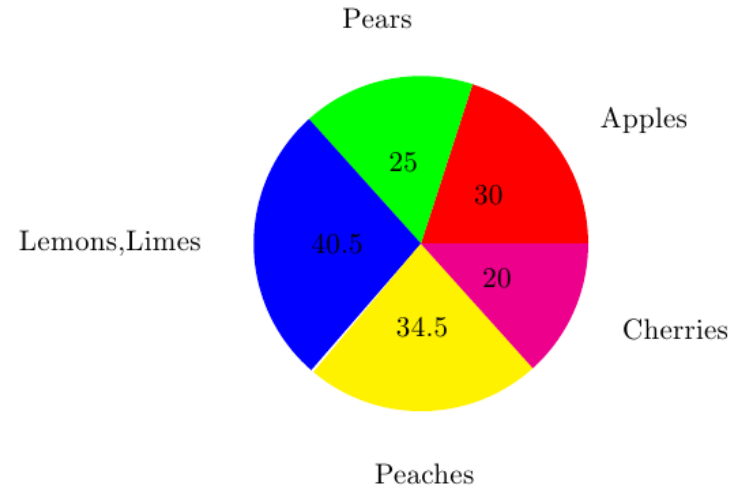
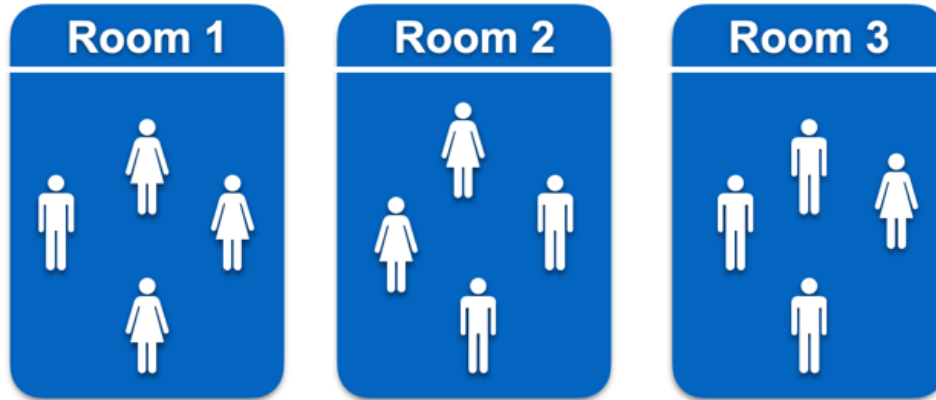


Figure 1: A pie chart

**For online delivery, what  
is your biggest  
challenge?**

# Sample answers from audience:

- Computer skills
- Organizing the session
- Keeping people engaged
- Staying on the subject
- Connecting with learners
- Using a whiteboard
- Technology breaking down
- Engaging the whole group
- Not having visual cues from the audience
- Breakout groups within applications
- Keeping focus on the workshop
- Making it interactive



## Reflect, Write, Share Method



In-person wait 7 seconds,  
online wait 12 seconds

## Traditional vs. Flipped Classroom

### TRADITIONAL

Lecture

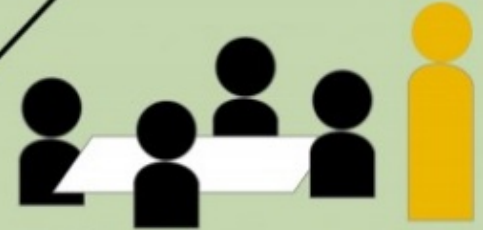


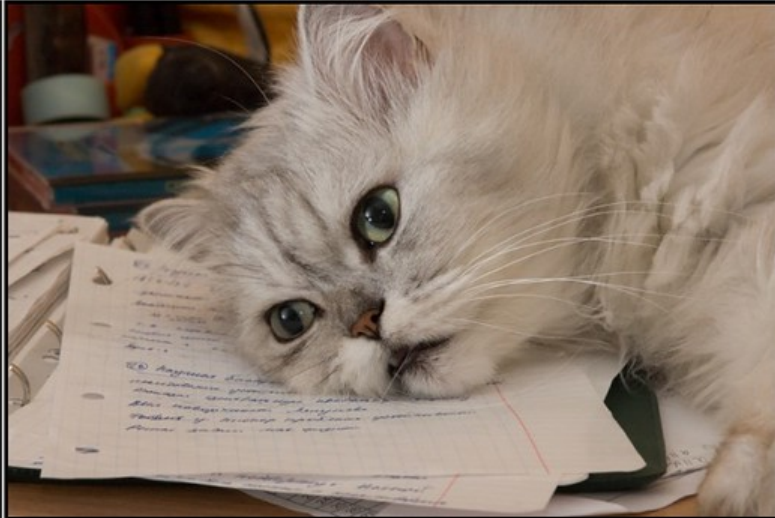
Homework  
activities

Lecture



Classroom activities





# PAPERWORK

You'll never be able to avoid it,  
even if you're reincarnated as a cat.







- ❖ Make forms accessible online
- ❖ Provide value for filling out forms
- ❖ Allocate time during workshop



# ONLINE MONEY MANAGEMENT TRAINING

Virtual and beyond!



**seed**  
WINNIPEG INC.



# Classroom Dynamics



1 hour



1:1 sessions with facilitator



Breakout rooms, interactive apps and whiteboard



Storytelling

- Prevent screen fatigue
- Dedicated space & relationship with facilitator and admin coordinator\*
- Group activities can still be fun virtually!
- Strength based training

# Participant Experience

- 10 to 12 participants
- Camera shy? No worries!
- Mute unless...
- Chat room extraordinaire
- Breaks? Sure!
- Zoom, Google Meet, Teams, Skype, Whatsapp, Messenger
  - "Meet & Greet" before a series of workshops

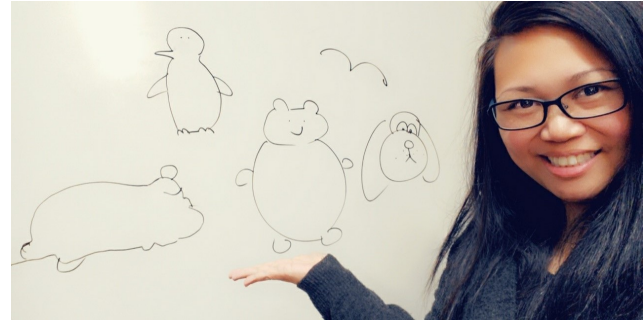


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# Meet & Greet Session

- Test accessibility
- Gauge participant comfort level
- Virtual tour of platform
- Introductions
- Housekeeping rules
- Icebreaker
- Personal Goals & Class Expectations



What is your "money" animal?





# Online Facilitator Skills a.k.a Virtual Astronauts

- Comfort speaking to space
- Prep essential – technology unpredictable
- Speaking, navigating and chatting all at the same time!
- How to deal with the silence
  - Identified folks comfortable speaking
  - Admin coordinator (wing person)
  - Encourage the chat room for engagement
- Have fun with your passion!





# 1:1 Sessions with Facilitator

- Relationship Building
- Retention
- Meet different levels of capacity
- Safe space
- Deeper look into personal money management
  - Create a personal budget
  - Credit and debt management
  - Saving & Investing
- Admin Coordinator
  - Forms
  - Evaluation tools
  - Participant manuals or handouts



# Fun tools!

- Mentimeter
- YouTube
- Jeopardy template
- Financial Consumer Agency of Canada!
- Guest Speakers





[www.menti.com](https://www.menti.com)

Code 94 55 14 6



# FINANCIAL CONSUMER AGENCY OF CANADA

Budget Planner – Group activity

<https://www.canada.ca/en/financial-consumer-agency.html>

**THANK YOU!**




Questions?





## Thank you for joining us!


- **We will be sending you an email soon with:**
  - Slides from today's webinar
  - Link to webinar recording
  - Link to post webinar survey
- **We will also post the recorded webinar on our Learning Hub:**
- <https://learninghub.prospercanada.org/webinars/>

 **Prosper Canada**  
LEARNING HUB

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### Who is the Hub for?


This Hub is for practitioners, policy-makers, funders, and advocates working to advance the field of financial empowerment.



This online tool will help newcomers to Canada successfully manage their money

[View >](#)


1 2 3 4



### Discover

Search the entire Hub for resources, reports, and research on financial empowerment topics from a number of organizations and agencies.


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Access collections of practical financial empowerment resources like curriculum and toolkits to support your work.

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