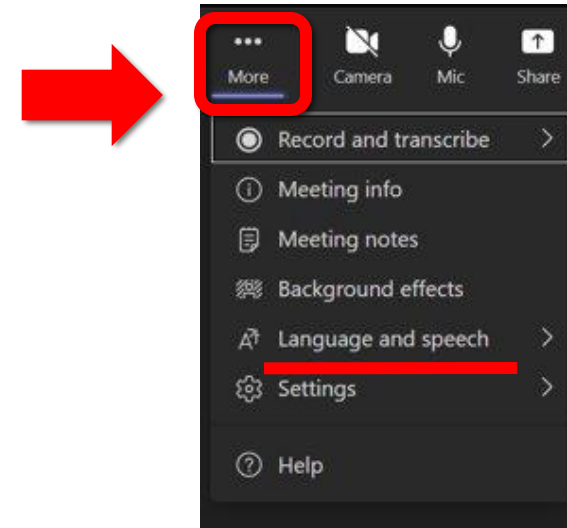
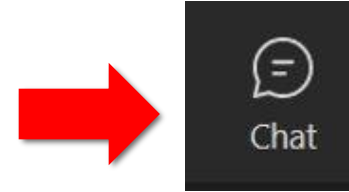


Technology requirements

- Audience members have all been put on “mute” for this webinar.
- Please share any questions you have using the “chat box” (located in the menu bar at the top of your screen).
- For closed captioning, on the top right menu bar, click the three dots with the word ‘More’ under it, then select ‘Language and Speech’ and then ‘Turn on Live Captions’.
- We will share webinar slides with all participants and post a recording of the session within a few days.



**Insights from the 'Building Financial Wellness in First Nation
Communities' Project**
May 15, 2024

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.

As **Canada's leading champion of financial empowerment**, we work with governments, businesses and groups to develop and promote financial policies, programs and resources that transform lives and foster the prosperity of all Canadians.

We help service systems and organizations in all sectors to build proven financial empowerment approaches into their businesses in ways that:

- Are **sustainable**
- Help them **achieve their goals**
- Tangibly **increase the financial well-being of the low-income people** they serve.



Land acknowledgement

Agenda

1. Welcome & warm-up
2. Project overview
3. Insights
 - Building effective partnerships
 - Service delivery tips: money, benefits and ID
 - Service delivery: tax filing
4. Questions & wrap-up



Introduction: Our speakers



**Helen Payne
Watt**
Senior Officer
Prosper Canada



John Cockburn
Financial
Empowerment
Coordinator
SCSC



Millie Acuna
Manager, Asset
Building Programs
SEED Winnipeg



Sally Massey-Wiebe
Financial
Counsellor/Coordinator
CFCS

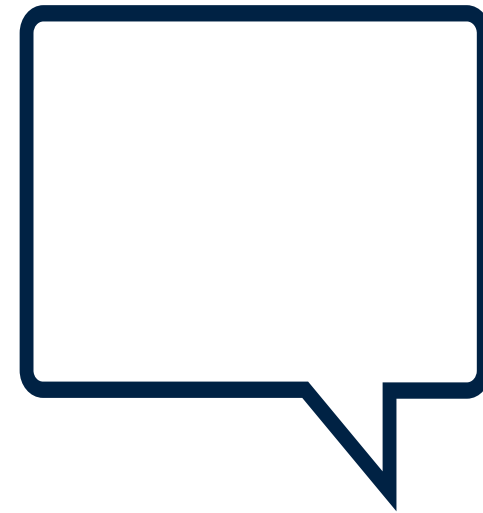


Amanda Hallett
Program Associate for
FWFN
CFCS

Welcome

To get to know each other, please write in the **chat**:

- Your name
- Your Organization



Project snapshot



Building financial wellness in First Nations

- A **two-year project** (2021-2023) led by Prosper Canada and funded by IG Wealth Management
- **Partnerships** between First Nation communities and non-Indigenous organizations delivered requested, tailored, in-person services:
 - Access to identification
 - Tax filing assistance to obtain refunds and benefits
 - Money management training, both group sessions and 1:1 financial counseling
 - Knowledge sharing and capacity building events.



Building financial wellness in First Nations

- **5,165** community members participated in group or one-on-one financial help services
- Estimated **\$8.15M** in new income
- **A process evaluation identified insights from this experience** that might be shared to scale financial empowerment to other interested First Nation communities across Canada.



Insights





Key insight #1 - Valued, requested services

Free financial empowerment services and supports are essential financial help that First Nation communities and members value and need.

- **Tax filing, access to benefits, access to identification (ID) and money management skills** are recognized by communities as important parts of the financial wellness of their members, households, and communities.
- But **assumptions should not be made** about what, when and how to connect communities with services.



Key insight #2 - Effective partnerships

Initiated by First Nations, **partnerships with non-Indigenous financial empowerment organizations can result in the delivery of appropriate and effective financial help** in First Nation settings.

- FE organizations that take a **slow, collaborative, and flexible approach** to partnership development and invest in trust-building and in-person visits are well positioned to be able to address the financial help needs of First Nation communities.
- FE organizations must **engage early and often** with Indigenous organizations, staff, and leaders to determine approach, services, timing, and content.
- **Maintaining a respectful relationship** with a committed First Nation contact in the community is key to a successful partnership.



Key insight #3 - Community-centered design

Community-Centered Design. Financial help services and supports must be appropriate and aligned with First Nation community priorities.

- Services that are **tailored to the community, culturally appropriate, flexible, and provided in partnership** with community staff can be effective and can promote uptake of additional services and supports.
- If requested, **capacity building** for First Nations staff to deliver FE services can follow.



Key insight #4 - Word of mouth

Positive **word of mouth** is the most effective way to promote service uptake within a community.

- Positive word of mouth also drives demand from other First Nation communities **creating pressure – and opportunity - for FE partners to expand services.**
- Though expansion of in person services is ideal, alternatives including virtual help lines, “train the trainers” programming, and approaches that integrate financial help within existing service systems may provide promising avenues for expanding reach.



Key insight #5 - Long-term commitment

Partnerships with First Nation communities are a **long-term commitment**.

- FE organizations need to commit to maintaining relationships with First Nation communities **beyond the vagaries of funding streams**.
- Supporting organizations like Prosper Canada and funders like IG Wealth Management **provide critical support to FE organizations to enable them to sustain the capacity** for service delivery, and to share learnings with each other and the broader field.

From the partners



Partnership insights with John



A “warm welcome” is essential.



Be there on a regular basis to establish trust.



You can't tell people what to do.



Don't just run in, do your business, and then leave again.

Financial help insights with Millie



**Money management
training**



Access to ID events



Train-the-trainer

Tax filing insights with Sally

What's different, what did you need to learn?

What's the same?

What do you wish you knew when you started?

What advice would you give other tax filing providers looking to provide tax filing service to First Nation communities?

Questions



Wrap-up

- **Thank you** to our speakers.
- Please look for **recommendations** we offer at the back of the Project Summary.
- Thanks to IG Wealth Management, we are excited to share that **this project will continue through the end of 2025.**



Thank you for attending this webinar

Please take a moment to provide your feedback by completing a [survey](#).

Sponsor



Contact

Prosper Canada

60 St. Clair Avenue East, Suite 700

Toronto, ON M4T 1N5

(416) 665-2828

www.prospercanada.org

<http://prospercanada.org/newsletter>

[Prosper Canada Online Training](#)

Ana Fremont (she/her)

Senior Manager

Program Delivery and Integration

afremont@prospercanada.org

