



## Hosting workshops and sign-up events for families

By Joe March and Luke Connell, Partnership Managers, SmartSAVER

[Jmarch@SmartSAVER.org](mailto:Jmarch@SmartSAVER.org)

[Lconnell@SmartSAVER.org](mailto:Lconnell@SmartSAVER.org)

Many families who could benefit from the Canada Learning Bond don't have it because they don't know about it or have an RESP account to receive it.

Community organizations and services that families trust play an important role in ensuring families learn about this benefit and have the opportunity to apply for it.

Here are tips on hosting a Canada Learning Bond workshop or sign-up event.

### PLAN AHEAD

- Give yourself one month to plan and one month to promote your workshop and/or sign-up event;
- An event might include a brief presentation about RESPs and the Canada Learning Bond, the opportunity to get a Social Insurance Number (if Service Canada is able to offer service in your location) and to apply for the CLB.

### FIND PARTNERS

Any agency serving families living on lower incomes with children born in 2004 or later could be interested in partnering:

- Schools, day cares, churches, community centres, libraries, employment and income support programs, public or co-op housing and ESL programs are all examples of the types of agencies that have partnered in delivering CLB workshops and sign-up events.

### CHOOSE A LOCATION CONVENIENT FOR FAMILIES

- Daycares, schools, community centres, libraries, employment centres and churches host other community events for families and can usually provide space for free;
- If your agency works with eligible families and you have the space, host your own event.

### CONNECT WITH SERVICE CANADA

- Some Service Canada offices are able to provide off-site Social Insurance Number sign-up service. If your local office offers this service, they typically require that the host site be able to provide access to a non-wireless internet connection. If your local office can't provide mobile service, consider organizing a group excursion to a nearby Service Canada office to ensure parents and kids get their Social Insurance Numbers in advance of your event. Both the applicant and the child require a Social Insurance Number to apply for the CLB.



## USE SMARTSAVER'S ONLINE APPLICATION OR INVITE LOCAL FINANCIAL INSTITUTIONS

- Make a few computers or tablets available to families to access SmartSAVER's online RESP and Canada Learning Bond application. In less than 10 minutes, families can start the process of opening an RESP with no fees and no contribution required with their choice of financial institution. Watch this [1-minute video](#) to learn how the process works.
- Alternatively, connect with local financial institutions and invite them to send staff to the event to start RESP accounts for families. Experience has varied from community to community, but most of the major banks and some credit unions have participated in local sign-up events.
- Involve RESP providers that won't charge fees or require a family to make a contribution so that no one is excluded from accessing the Canada Learning Bond.

## PICK YOUR TIMING

- Choose a date that builds on and doesn't conflict with other community events;
- Try to keep the event under four hours. Events held in the morning (9 am-12 noon) and late afternoon (3 pm-6 pm) seem to attract more parents than ones held in the middle of the day.

## PROMOTE YOUR EVENT\*

- Create an eye-catching, colourful flyer and make sure to include the logos of partner agencies. This will increase awareness and trust. Check out the [Promotional Tools](#) on SmartSAVER's community website, created by other organizations for ideas on what to include.
- Engage local agencies in promotion:
  - Include agencies that work with children and agencies that support families living on lower incomes, like employment and income support services, public housing, local media, local churches and local schools;
  - Ask agencies to register parents or keep track of the number who will be attending to help you to plan. Offering refreshments is usually a big hit!

## PREPARE YOUR WORKSHOP

- A presentation for families about RESPs and the Canada Learning Bond should include basic information about RESP accounts, the Canada Learning Bond and the Canada Education Savings Grant. Check out our [starter presentation template](#).

**\*Promotion is very important to make sure your event is successful and benefits the most number of families possible. Many parents are unfamiliar with the Canada Learning Bond and may be wary of financial products. Make every effort to reassure parents that**

**the event is free and that the CLB is available with no family contribution. Make sure agencies promoting the event clearly understand this as well. Their ability to confidently promote participation will increase attendance.**

## THE DAY OF THE EVENT

- Assign a greeter to register parents as they arrive and to encourage walk-ins to participate;
- Establish separate activity areas:
  - Workshop space for RESP and Canada Learning Bond information
    - Staffed by you and/or other event organizers;
  - RESP Account Sign-Up Area
    - Space with computers or tablets to access the online application at [www.SmartSAVER.org](http://www.SmartSAVER.org);
    - Or area staffed by financial institutions. Requires some privacy to discuss personal information;
  - Social Insurance Number Registration (if possible)
    - Staffed by Service Canada. Requires some privacy to discuss personal information;
  - Waiting and Childcare Area
    - An opportunity for you and your partners to provide related workshops or information to families.