CHARTERED PROFESSIONAL ACCOUNTANTS CANADA

Facilitator's Guide

ADULTS

Everything you need to know and do to present your session effectively and improve the financial literacy skills of adults!

STEP ONE

Before the Session...Getting Prepared

The secret to being a great facilitator is preparation. Follow these steps to ensure you feel ready to lead your session.

Learn all you can about the target audience and their interests, current realities, and sensitivities in order to tailor your messages. For example – inquire about gender, age, occupation, and stage in the family life cycle. Are they new immigrants, seniors, or students? Think about what aspects of your presentation will matter most to the audience.

Find out in advance about the session requirements. Ask your host/contact if there is a projection screen, flipcharts, markers, masking tape. Will a laptop be provided or should you bring your own? Is there an IT technician available if needed? What is the room and seating plan like? Will pens or pencils be provided? Will the host make copies of the presentation and/or handouts for participants?

Review the session overview before presenting. Familiarize yourself with the PPT slides, speaking notes, learning materials, and handouts until you feel confident. Plan to spend at least 2 hours preparing and practicing.

Personalize the speaker notes so that they sound comfortable for you. Please note: For consistency's sake, please stick to the key messages of the session but feel free to share a personal anecdote or case study to illustrate a point.

Practice delivering the session. Take time to do a speak-out-loud rehearsal and think about points to emphasize and ensure proper timing. (Formal presentation should run no longer than 45 minutes to allow time for Q&As.)

Register your session with CPA Canada. This is necessary to receive CPD credits for the session. CPD credits are determined by the provincial bodies. Please contact your provincial body for eligibility

See the following page for a sample of a customizable session invitation.

Session Invitation Template

CPA CHARTERED PROFESSIONAL ACCOUNTANTS CANADA COMPTABLES PROFESSIONNELS AGRÉÉS CANADA

Invitation to host a financial literacy school session

The Caribbean chapters of the Chartered Professional Accountants of Canada (CPA Canada) is pleased to introduce its community-based financial literacy program that provides financial literacy education sessions to help Barbadians to improve their financial decision-making skills.

Each financial literacy education session is free and is provided as a public service by local Chartered Professional Accountants to those who want to improve their finances and, over time, to achieve their life goals

Topic:

- Are you a good financial role model?

Each workshop is free and is provided as a community service by Chartered Professional Accountants in the Caribbean.

We will provide:

- CPA volunteers to lead the workshop
- A prepared activity-based workshop
- All necessary handouts and worksheets

Your role is to provide a location, date and time and help with distributing invitations and encouraging participation. I will be in touch shortly to gauge your interest. Should you wish to book immediately, I can be reached at [email and/or telephone number].

Regards,

STEP TWO

On the Day of the Session... Arrive Early

An early arrival at the session location allows you to get organized and oriented before the participants arrive.

- Introduce yourself to the program co-ordinator
- Check the room and ensure that all equipment, supplies, and refreshments are onsite
- Locate the washrooms and exits
- Test your laptop and projector
- Adjust the lighting and/or temperature if necessary
- Arrange the seating/room layout for optimal interaction and visibility
- Prepare the flipchart with a welcome message, the title of the session, and your name

Checklist:

- ☐ Presentation on a USB stick
- ☐ Laptop (unless provided on site)
- ☐ Projector (unless provided on site)
- ☐ Copies of presentation as handouts with room for notes for each participant (unless provided on site)
- ☐ Flip chart and markers (if required)
- ☐ Copies of evaluation forms (unless provided on site)
- ☐ Business cards

Remember!

As session leader you have four key responsibilities:

1. To share your knowledge in a way that is easy to understand
2. To be positive and energized
3. To keep on topic
4. To provide opportunities for participants to ask questions

STEP THREE

During the Session...Engage the Audience

Much of the success of the session will depend on the enthusiasm and energy you bring to the program.

- Start and end on time, and keep the pace of the session lively.
- Greet participants at the door with a smile.
- Introduce yourself and briefly share some of your experience to build credibility.
- Distribute the hand-outs at the outset.
- Present, don't read the material.
- Make eye contact and ask questions to interact with participants.
- Be open to questions and comments throughout the presentation.
- Leave time at the end for additional questions and answers.
- Thank participants for attending, ask them to complete the evaluation forms, and collect the evaluations.
- Connect with the program coordinator and express your appreciation.
- Return evaluations to CPA Canada at financialliteracy@cpacanada.ca

✕ **CAUTION! Do Not...**	✓ ***INSTEAD! Do...***
Do not use professional jargon or assume everyone understands financial basics.	Do use plain language and check for understanding. Call the organization ahead of time to get a better understanding of the audience and any sensitivities.
Do not offer specific personalized advice.	Do suggest that individuals speak to their own financial advisor/CPA for advice.
Do not get sidelined by questions that are off topic.	Do 'park' these questions. Capture them on a flipchart and return to them only if time permits.
Do not get bogged down in complex or technical explanations.	Do 'read' your audience for pacing clues and use generic easy-to-follow examples.
Do not lose track of timing	Do skip or shorten discussions if needed, but still attempt to summarize key messages.

STEP FOUR

After the Session...Share Your Feedback

Optimize the opportunities for learning and sharing immediately following the session.

1. **Review your evaluations to gain personal insights on how to enhance your future sessions**
   - Constructive feedback will help you develop your presentation skills. Look for the positives and build on those. Consider the negatives and plan for improvement.
   - Make notes immediately following the session so that you can recall the changes you want to make the next time you present.
2. **Share your experience with CPA Canada**
   - Register your event and earn professional development points.
   - Scan and email completed participant evaluations to financialliteracy@cpacanada.ca
3. **Talk to other CPAs and share the benefits you gained from participating in this program and encourage their involvement.**
   - Remember that you are part of a national team and that your experience will help a fellow CPA become more effective as an advocate for financial literacy in their community.

See the following page for a sample of a participant evaluation.

Session Evaluation Form

CPA CHARTERED PROFESSIONAL ACCOUNTANTS CANADA

Financial Literacy
Session Evaluation Form - Caribbean

Date: _____ Presenter: _____

Session Topic: _____

Host Organization: _____

Parish/Town/City: _____ Country: _____

My overall rating of this session is:
☐ Poor ☐ Neither ☐ Good ☐ Very Good ☐ Excellent

The presenter's knowledge of the subject was:
☐ Poor ☐ Neither ☐ Good ☐ Very Good ☐ Excellent

The presenter's presentation style was:
☐ Poor ☐ Neither ☐ Good ☐ Very Good ☐ Excellent

Relevance of the material presented was:
☐ Poor ☐ Neither ☐ Good ☐ Very Good ☐ Excellent

The most valuable idea you learned and will use is:

_____

_____

What improvements could be made for this session?

_____

_____

_____

Does this motivate you to learn more and continue to make changes to improve your financial life?
☐ Yes ☐ No

Would you attend another session on financial education provided by CPA Canada?
☐ Yes ☐ No

Additional Comments/Suggestions

_____

_____

_____

Volunteer Top Tips

General Tips

- Keep a lively pace and be positive
- Talk to your audience – don't read!
- Make eye contact and interact with your audience (questions, stories etc.)
- Stay on time, stay on topic and be easy to understand
- Know who you are speaking to
  - Call the organization ahead of time to get a better sense of your audience
- Keep it simple!
  - Avoid using jargon or assume that everyone knows what you are speaking about.
- Use Stories
  - People like to learn from people so don't be afraid to share a personal story or use a story that you have heard about from a family member/friend or from a previous session.

Tips for Dealing with Difficult People

- It's not always about you!
  - Stay calm – remember you are the leader so your behaviour will help others stay calm.
  - Move – moving away from the place where you were standing when someone was rude or hurtful to you will put the moment behind you.
  - Don't look back – acknowledge the individual and his/her comments briefly but don't argue or re-engage. Instead, focus on the other participants and move forward with the presentation.
- No arguments/criticism
  - The fastest way to turn a bad moment into a bad day is to respond in anger or sarcasm. Arguments and criticism of your difficult person only diminishes you in the eyes of your audience.
- Individually discuss preferred behaviour
  - Most difficult people give up when their behaviour does not bring a lot of attention. Find a way to meet the difficult person individually (for example, learn their name and don't be afraid to pleasantly tell them if their comments or questions are making it difficult for others to learn and enjoy the session).
  - Offer to meet with the individual after the session (they seldom do – it's not as much fun without an audience).

Session Overview

Adults

Session:

Are You A Good Financial Role Model?

Audience: Parents

Outline:

- The goal and challenges of teaching kids about money

1. Characteristics of a Good Financial Role Model
2. Ten Healthy Habits of Financial Management
3. How to set financial goals
4. Resources
   - Q&A

Learning Objectives:

- To self-assess where you stand as a financial role model
- To learn the Ten Healthy Habits of Financial Management
- To obtain resources to help them get their financial house in order
- To understand S.M.A.R.T. goals & effective goal setting

Learning Materials:

- *Goal Setting worksheet* — This tool helps set SMART goals which are specific, measurable, action- oriented, realistic, time-framed.
- *Role Model Self-Assessment worksheet* — This survey helps you determine what kind of financial role model you are.
- *Values Validator worksheet* — This worksheet helps you determine the things in life that are most important.