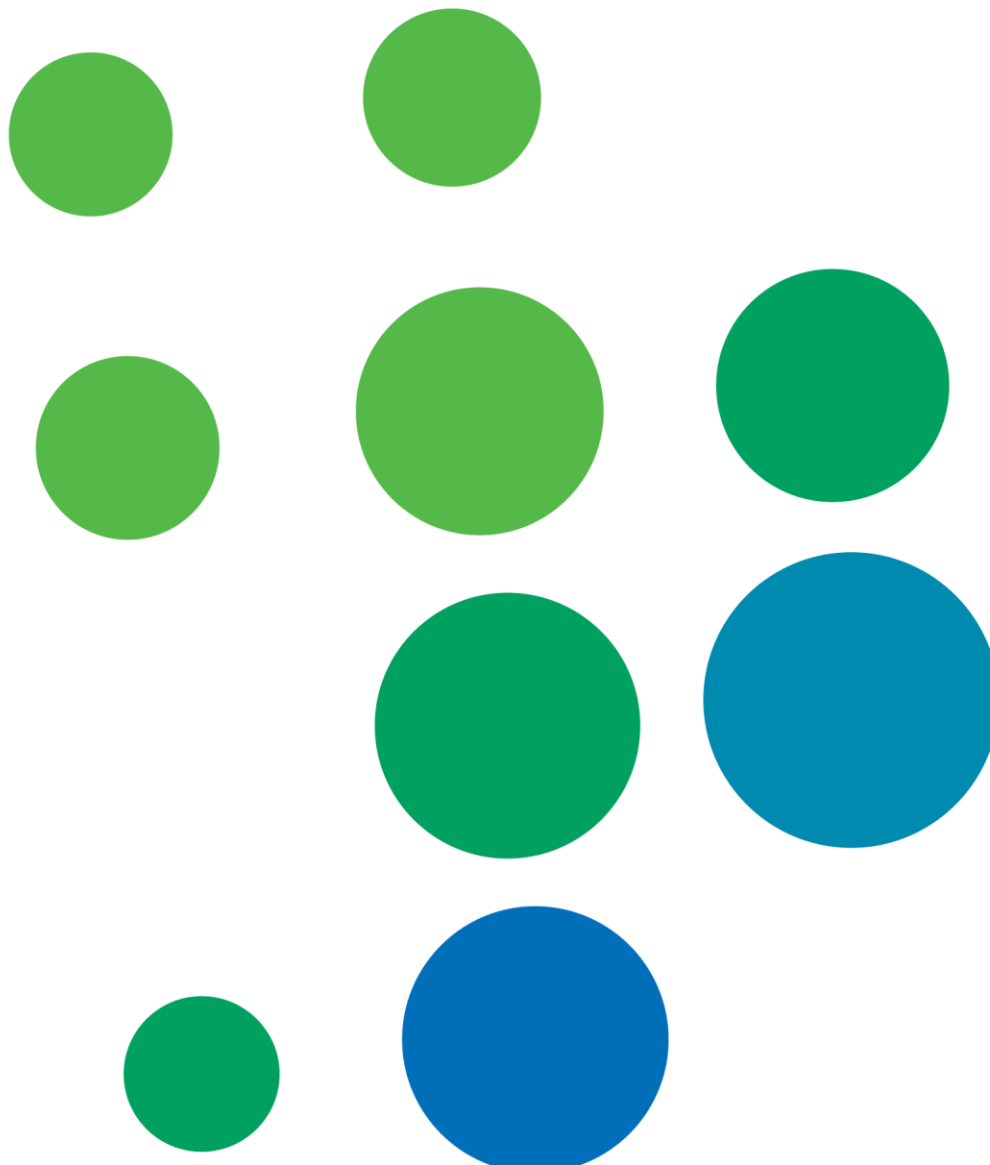


CPABC Financial Literacy Program

New Host Organization Walkthrough: Requesting Your First Session

Fall/Winter 2025/26



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Contact Information

Chartered Professional Accountants of British Columbia

finlit@bccpa.ca

604-200-2843

#800 – 555 West Hastings St

Vancouver, BC, V6B 4N6

1. Welcome to the CPA Financial Literacy Program!



The [CPA Financial Literacy Program](#) delivers free, unbiased, objective financial education to Communities across Canada. Our award-winning program aims to give participants the knowledge and confidence needed to make smart financial choices and accomplish their life goals.

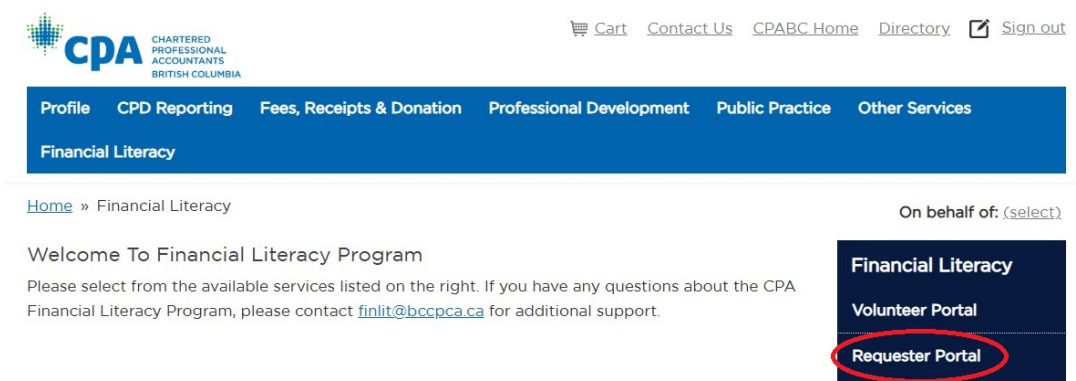
By becoming a host organization you've taken an important step towards meeting the growing demand for financial education in British Columbia and the Yukon.

In this guide you'll learn about requesting a financial literacy session and working with a CPA volunteer to deliver it.

2. You've created an account to become a host organization...now what?

After you've created your account, you'll be able to access the [online portal](#) that serves as a hub for all your financial literacy requests and activity. Upon signing into your account, you'll be taken to the portal. Click the Financial Literacy Tab and then "Requester Portal". Here you'll see the following options:

- **My Requested Sessions:** Here you can view all the financial literacy sessions that you have requested. Sessions are sorted into three categories: upcoming, past, and cancelled.
- **Browse and Request a Session:** This will take you to the page where you can browse our 40 sessions. You can also search for sessions by audience category, with 11 different audiences to choose from. This is where you can request your first financial literacy session.



3. Requesting your first session

Once you've familiarized yourself with the portal, it's time to request your first financial literacy session. This is a fast and easy process:

- After clicking "Browse and Request a Session" in the Requester Portal, find your desired session using the search tool
- View your desired session's information page and then click the blue "Request this Session" button
- Fill out the required information for your session request and click "Submit Request" at the bottom of the page
- You will receive a confirmation email and matchmaking to find a CPA volunteer will begin

Tips

- To best match you with a CPA volunteer presenter, please make all session requests **at least three weeks in advance**. If you request an earlier date, we will do our best to accommodate you.
- If we are unable to accommodate a session date, we will always work to find an alternative date
- CPAs are busier at certain times of the year, such as during tax season (February, March, and April). Finding presenters may take longer than usual during busy periods, so we ask for more notice during these times
- We can accommodate requests for sessions to be presented in languages that are not listed on our website. To submit a request for an unlisted language, please select "other" as your preferred language and state your desired language in the Special Requests box. You can also email us the details at finlit@bccpa.ca
- A financial literacy session is typically 60 minutes long, but if you'd prefer to hold a session of a different length, please contact us at finlit@bccpa.ca and we can help you organize this
- To request multiple sessions over a one or two-day period (e.g., schools request multiple sessions for different classes throughout the day) please ensure that you submit a separate request for each session. This helps us, volunteers, and yourself to stay organized

Once you have completed a session request, your request will appear under "My Requested Sessions" in the portal within two to three business days.

4. How do we match you with a CPA volunteer presenter?

CPABC's Financial Literacy system connects host organizations like you with CPA volunteers across BC and the Yukon by matching hosts and volunteers based on specific preferences of both parties including:

- Preferred audience type (schools, youth, seniors, adults, etc)
- Preferred session format (online, hybrid, or in-person. Online sessions can be presented by any volunteer regardless of location preferences.)
- Preferred volunteering region(s)/location(s)
- Preferred language(s)

Connecting with a CPA volunteer presenter

After a volunteer registers to present your session, you'll be introduced to them via email. Both parties' contact information will be shared as well as logistics for the session such as day and time, location, format, approximate number of attendees, and language. We highly recommend the two parties connect before the session to go over logistics and any special requirements the presenter should know regarding the host organization or audience.

Cancelling or rescheduling a session

If you need to cancel or reschedule a session, please email finlit@bccpa.ca and let us know. If you need to reschedule, we can work with you to determine an alternate date.

5. Host and volunteer responsibilities

Hosts and volunteers have different responsibilities before, during, and after a session. The tables below outline the steps both parties are expected to follow to prepare for and present a session.

In-person sessions

Host responsibilities		Volunteer responsibilities	
Before the session			
Inform the volunteer and CPABC of scheduling changes or cancellations related to the session		Inform the host and CPABC of any scheduling changes or cancellations related to the session	
Inform the volunteer of any special instructions (parking, building entrance, room number, etc.)		Learn more about the session participants and make any adjustments to the presentation	
Secure a space for the session and ensure it can accommodate the number of participants		Download session materials and ensure they are ready to be presented	
Promote the session and manage attendance (RSVP or drop-in)			
Download participant materials			
		Make any desired adjustments to the presentation content and/or speaking notes	
Day of the session			
Provide any equipment for the presentation (projector, monitor, computer, etc.)		Arrive on time with sufficient time for set up	
Distribute participant materials (or distribute in advance)		Present the session in the provided space and in a professional manner	
After the session			
Complete our evaluation survey if desired		If the session was organized outside the volunteer portal, self-report the session	

Virtual sessions

Host responsibilities		Volunteer responsibilities	
Before the session			
Inform the volunteer and CPABC of any scheduling changes or cancellations		Inform the host and CPABC of scheduling changes or cancellations related to the session	
Set up the online meeting using your preferred platform		Learn more about the session participants and make any adjustments to the presentation	
Send the volunteer and participants the link to join the session		Download session materials and ensure they are ready to be presented	
Promote the session and manage attendance (RSVP or drop-in)			
Download participant materials			
		Make any desired adjustments to the presentation content and/or speaking notes	
Day of the session			
Distribute participant materials (or distribute in advance)		Join the session with enough time to prepare and ensure any technical issues are sorted	
Launch session with enough time to prepare and address any technical issues. Consider making the volunteer a meeting co-host and testing speakers and screen sharing		Present the session in a professional manner	
After the session			
Complete our evaluation survey if desired		If the session was organized outside the volunteer portal, self-report the session	

6. Downloading session participant materials

As the session host, you are responsible for downloading and distributing the participant materials for your session. To download participant materials for your session, follow these steps:

- Click “My Requested Sessions” in the Requester Portal
- Find your session in the “Upcoming Sessions” tab, then click “Download Session Handouts”
- A folder containing the participant materials will be downloaded

7. Frequently asked questions

Are financial literacy sessions free?

Yes, CPABC financial literacy sessions are free to request and hold.

How far in advance should I make my session requests?

At least three weeks in advance. If you request an earlier date, we will do our best to accommodate.

Can I request multiple sessions for a single day?

Yes. Please make a new request for each session and make all requests at least three weeks in advance.

I need to cancel/reschedule a session, what do I do?

Please email finlit@bccpa.ca. If you need to reschedule, you can discuss alternative dates with your volunteer presenter (if matched with one). We can also help you to figure out an alternative date.

A volunteer canceled/needs to reschedule a session, what should I do?

If the volunteer needs to reschedule, discuss an alternative date with them if possible and inform us via email if you decide on a new date. If the volunteer cancels, there is no required action on your part, we will work to find a replacement volunteer.

What should I do if only two or three participants show up to my session?

In this case, it will be up to yourself and the volunteer presenter to decide if you'd like to reschedule or continue with the session as planned.

I personally know a volunteer who wants to present my session, do I still need to make a request?

No. You can coordinate with the volunteer without using the portal. We only ask that the volunteer self-reports the session once it is done.

Can I request a private financial literacy session outside of my organization?

Yes. If you'd like to hold a private financial literacy session, we ask that you have at least eight attendees and enter "private session" as the host organization when filling out the session request form.