

1. Form a planning group of approximately 5 enthusiastic residents (someone with knowledge and experience of divesting their banking and investments from fossil fuel associated companies).
 - a. Develop format i.e. number of topics (i.e. investment strategy, investment products, Q&A session), delivery (speakers, information tables or hybrid), refreshments?
 - b. Develop schedule - how many minutes per speaker, time for Q&A, time for mingling & one-on-one information gathering. Plan at least a 2 hour event.
 - c. Consider developing a simple survey to measure the impact of the event.
 - d. Create a page on your website for resource documents recommended by speakers etc. to help attendees find trusted information as they begin divesting and re-investing.
2. Book a meeting space within the neighborhood i.e. community centers, Church meeting halls, schools etc.
 - a. Check that audiovisual equipment is available or arrange to rent if needed.
 - b. Consider how to best to use the space for the event and create a floor plan.
3. Use the networks of your planning group to find knowledgeable speakers on chosen topics and remind speakers to keep slides legible and concise. For example:
 - a. Personal journey divesting from fossil fuel companies
 - b. Strategies for changing to climate-aware investments
 - c. Advocating for Public Pension funds to divest
 - d. Options for re-investment in climate-friendly ways.
4. Set-up an Eventbrite page or other platform to register attendance and perhaps sell tickets to cover costs.
 - a. Description of the event and number of tickets
 - b. Biographies of speakers
 - c. Organizations represented at information tables
 - d. Date, time and location
 - e. FAQs i.e. Transportation options, parking locations
5. Advertise the event
 - a. Newsletters; CAFES, Community Association, local councillor, other climate-focused organizations
 - b. Community newspaper advertisements and articles
 - c. Social media platforms
6. Seek volunteers
 - a. To greet speakers & organizational representatives
 - b. To set up chairs and tables
 - c. To pick up refreshments if needed.
 - d. To monitor the door & sign in guests/ check tickets
7. Send out a friendly reminder to attendees a few days before the event.
8. After the event, send a thank-you to all the volunteers and refreshment donors. Email attendees the link to the resource documents: <https://glebeca.ca/environment-committee/climate-your-cash-resources/>
9. Amplify the information learned from the event by writing an article for your community newspaper.

Organizing a Climate & Your Cash Event

Example of a Climate & Your Cash Event:

The Glebe Community Association (GCA) Environment Committee in partnership with Community Associations for Sustainable Environment (CAFES) organized a *Climate & Your Cash - Glebe* event on Sunday, November 30, from 9:30 to 11:30 a.m.



Climate & Your Cash

Do you want to divest from financial products that support the fossil fuel industry? Learn how you can re-invest for both returns and positive impacts — think renewable energy and affordable housing! **Climate & Your Cash** is your opportunity to discover sustainably focused organizations creating real change in the investment world!



Adnan Shaikh, National Bank Financial:
Strategies for climate-aware investing



Cheryl Randall, Shift Action:
Influencing the Canada Pension Plan to align investments with a zero-carbon future



Kate Reekie, Glebe resident:
Lived experience with divesting retirement funds and banking from fossil fuels



Moderator: Susan Rohac, retired, Business Development Bank of Canada, Climate Tech Fund



THREE IN-PERSON EVENTS

THE GLEBE
Sunday 30 November 2025
9:00 – 11:30 a.m.
Glebe Community Centre
175 Third Ave, Ottawa, ON K1S 2K2

Reserve your spot:
https://bit.ly/Climate_and_Your_Cash
Tickets: \$10.00

SOON TO BE ANNOUNCED
Two more venues in other regions of Ottawa

Graphic created by Magdalene Carsons, CAFES

The event involved two sessions: Investment Strategies and Investment Products with a Q&A session and time for visiting information tables. The three speakers for the Strategic session were as follows:

- Kate Reekie, a local resident, outlined her personal experience,
- Adnan Shaikh, investment banker, outlined strategies for climate-aware investing at different stages of life,
- Cheryl Randall shared information on why our public pension funds are critical for climate & how we can influence pension funds to align with a zero-carbon future, with real-world examples of successful action.

The Investment Products session covered Ottawa Renewable Energy Cooperative (Marion Sierkierski) and Forever Housing Bonds (Mike Bulthuis).

Representatives from The Co-operators Insurance (Liv Gauthier), CAFES, Shift Action, National Bank Financial, OREC and Housing Bonds Forever were available to answer attendees' questions. A resource table with free copies of Corporate Knights Annual Report on the Top 100 Most Sustainable Companies and a QR code for

Organizing a Climate & Your Cash Event

resources shared by speakers including their presentations was available. For examples of resource documents see: <https://glebeca.ca/environment-committee/climate-your-cash-resources/>

The event was promoted using a social media graphic created by Magdalene Carsons from CAFES which included a QR code to enable people to immediately register using their phone (see image). The graphic was shared with Capital Ward Councillor's office for inclusion in his weekly newsletter and with the Glebe BIA for inclusion in their events calendar. An article was written for the Glebe Report and adverts appeared in seven community newspapers throughout October and November.



Investment Strategy session



Investment Products session

Overall, the event was successful with several positive comments from attendees (as shown below).

"Excellent speakers - practical, honest, insightful and inspiring..."

"Provided helpful information to assist me with my investment decision making."

"Great event. Speakers used very clear & accessible language. Easy to follow even without prior knowledge of some of the topics."



Organizing a Climate & Your Cash Event
"We should have more of these."

"I have followed this issue through 'Shift' pension organization and other finance/ climate justice organizations. Also consulted my own and other financial advisors e.g. 'Good Investing' webinars. I came to learn more and advance my decision-making readiness - Mission accomplished!"

Climate & Your Cash – Glebe attracted 108 attendees (90 tickets sold and 18 volunteers). Of the 36 attendees who completed our survey (shown below) 70% indicated they would consider changing their and 28% indicated they would consider changing their banking institutions investments after this event.

Climate & Your Cash

Survey Questions:

We would like to understand the role that the environment plays when Ottawa residents make banking and investment decisions. Please answer the following questions. Your answers will help us plan future events.

Q1: What are the first three digits of your postal code? _____

Please circle the response that best applies to you.

Q2: What is your age category?
 a) Up to 29 b) 30-49 c) 50-64 d) 65+

Q3: Where did you find out about this event?
 a) Advertisement b) Social media c) Councillor newsletter
 d) Other newsletter e) Friend/family f) Other – please specify

Q4: Do you currently have some investments that are described as environmental or sustainable?
 a) Yes b) No c) Not sure

Q5: Are you considering changing your banking institution after this event?
 a) Yes b) No c) Not sure

Q6: Are you considering changing your investments after this event?
 a) Yes b) No c) Not sure

Q7: Was this event helpful?
 a) Yes - What did you like?

 b) No - What did we miss?

Comments:

Thank you for responding to our survey!

Survey

Organizing a Climate & Your Cash Event

Lessons learned from Climate & Your Cash - Glebe:

1. Arrange & promote availability of a children's table for quiet activities such as colouring (parental supervision).
2. Encourage speakers to have concise slides with key messages rather than wordy or data-heavy slides.
3. Invest in high quality audio/ visual equipment.
4. Advertise over several issues of local newspapers and promote using social media and newsletters.
5. Communicate that events are non-profit and that ticket sales cover costs such as videography.