When it comes to financial literacy, it’s sometimes better to call in the experts. Use this checklist to identify potential partners and complete first steps toward establishing a working relationship. The first section provides an example of a possible partnership with a local library.

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Type of Partner** | **Potential Partner** | | **Partnership Options** | | | **Best Approach** | **Steps to Establishing a Partnership** |
| *Name & Contact Information* | *Research* | *Financial Literacy Area* | *Collaboration Type* | |
| Age/Grades | Length |
| Bank  Library  Government  agency  Nonprofit  organization  Other: | ABC Local Branch Library  555 Street Lane  (2 blocks from the site)  000-0000 | The local branch offers an activity series for kindergarten and first grades. The series meets once a week for four weeks. Books about earning and spending are read aloud, the librarians hold a discussion, and then students participate in a related hands-on activity. | Earning  income  Spending  Credit and  debit  Protecting  and insuring  Saving  and investing | K-3  4-8  9-12  Adults | One-time  training/  activity  Training/  activity  series  Field trip  Club  Professional  development | Phone call  Email  **x**  Complete  the official  request form.  Ask a  colleague or peer for an introduction. | 1. Hold an introductory meeting. 2. Offer a tour or visit to the afterschool site. 3. If applicable, visit the partner’s site. 4. Complete a memorandum of understanding (MOU) to outline partnership details. |

Use this chart to organize your own potential partnerships.

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Type of Partner** | **Potential Partner** | | **Partnership Options** | | | **Best Approach** | **Steps to Establishing a Partnership** |
| *Name & Contact Information* | *Research* | *Financial Literacy Area* | *Collaboration Type* | |
| Age/Grades | Length |
| Bank  Library  Government  agency  Nonprofit  organization  Other: |  |  | Earning  income  Spending  Credit and  debit  Protecting  and insuring  Saving  and investing | K-3  4-8  9-12  Adults | One-time  training/  activity  Training/  activity  series  Field trip  Club  Professional  development | Phone call  Email  Complete  the official  request form.  Ask a  colleague  or peer for an introduction. | 1. Hold an introductory meeting. 2. Offer a tour or visit to the afterschool site. 3. If applicable, visit the partner’s site. 4. Complete a memorandum of understanding (MOU) to outline partnership details. |