



# Partnership Planner

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.

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		
<input type="checkbox"/> Bank <input checked="" type="checkbox"/> Library <input type="checkbox"/> Government agency <input type="checkbox"/> Nonprofit organization <input type="checkbox"/> 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.	<input type="checkbox"/> Earning income  <input checked="" type="checkbox"/> Spending  <input type="checkbox"/> Credit and debit  <input type="checkbox"/> Protecting and insuring  <input type="checkbox"/> Saving and investing	<input type="checkbox"/> K-3 <input checked="" type="checkbox"/> 4-8 <input type="checkbox"/> 9-12 <input type="checkbox"/> Adults	<input type="checkbox"/> One-time training/activity  <input checked="" type="checkbox"/> Training/activity series  <input type="checkbox"/> Field trip  <input type="checkbox"/> Club  <input type="checkbox"/> Professional development	<input type="checkbox"/> Phone call  <input type="checkbox"/> Email  <input checked="" type="checkbox"/> Complete the official request form.  <input type="checkbox"/> Ask a colleague or peer for an introduction.	<ol style="list-style-type: none"> <li>1. Hold an introductory meeting.</li> <li>2. Offer a tour or visit to the afterschool site.</li> <li>3. If applicable, visit the partner’s site.</li> <li>4. Complete a memorandum of understanding (MOU) to outline partnership details.</li> </ol>





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Use this chart to organize your own potential partnerships.

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