



## 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.	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.		



## Partnership Planner

Use this chart to organize your own potential partnerships.

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 type="checkbox"/> Library <input type="checkbox"/> Government agency <input type="checkbox"/> Nonprofit organization <input type="checkbox"/> Other:			<input type="checkbox"/> Earning income <input 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 type="checkbox"/> 4-8 <input type="checkbox"/> 9-12 <input type="checkbox"/> Adults	<input type="checkbox"/> One-time training/activity <input 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 type="checkbox"/> Complete the official request form. <input type="checkbox"/> 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.		