A purple rectangle with white background

Description automatically generatedA black background with a black square

Description automatically generated with medium confidence**Financial Literacy Partnership Planner**

**What to do:** Review the example below to see how to use this planner. Then use the blank planner on the next page to identify potential partners and take first steps toward establishing a working relationship.

**Why it matters:** When it comes to financial literacy, it’s sometimes wise to call in experts who can bring specific knowledge and additional resources. This can help your staff students and families to get accurate information and make connections with resources in the community.

**Planner**

**Example**

|  |  |  |  |
| --- | --- | --- | --- |
| Type of Partner: ☐ Bank or insurance agency ☒ Library ☐ Government agency ☐ Nonprofit organization ☐ Other | | | |
| Potential Partner: | ***Name***  ABC Local Branch Library | ***Location***  555 Street Lane (5 blocks from the site) | ***Phone or email***  000-000-0000 |
| Rationale: | The library offers an activity series for kindergarten and first grade. The series meets once a week for four weeks. Books about earning and spending are read aloud, the librarians lead a discussion, and then students participate in a related hands-on activity. | | |
| Financial Literacy Area: ☒ Earning ☒ Spending ☐ Credit and debt ☐ Protecting and insuring ☐ Saving and Investing | | | |
| Target Audience: ☒ K-3 ☐ 4-8 ☐ 9-12 ☐ Adults | | | |
| Type of Collaboration: ☐ Professional development for program staff ☐ Event(s) for families ☐ One-time activity for students  ☒ Series of activities for students ☐ Field trip ☐ Club | | | |
| Duration: ☐ One-time event or activity ☒ Series of events or activities | | | |
| Most Effective Approach: ☐ Phone call ☐ Email ☒ Complete official request form ☐ Ask colleague or peer for introduction | | | |
| Steps to Establish a Partnership (check off as completed):  ☐ Hold an introductory meeting.  ☐ Offer a tour or visit to the afterschool site.  ☐ If applicable, visit the partner’s site.  ☐ Complete a memorandum of understanding (MOU) to outline partnership details. | | | |

**Template**

|  |  |  |  |
| --- | --- | --- | --- |
| Type of Partner: ☐ Bank or insurance agency ☐ Library ☐ Government agency ☐ Nonprofit organization ☐ Other | | | |
| Potential Partner: | ***Name*** | ***Location*** | ***Phone or email*** |
| Rationale: |  | | |
| Financial Literacy Area: ☐ Earning ☐ Spending ☐ Credit and debt ☐ Protecting and insuring ☐ Saving and Investing | | | |
| Target Audience: ☐ K-3 ☐ 4-8 ☐ 9-12 ☐ Adults | | | |
| Type of Collaboration: ☐ Professional development for program staff ☐ Event(s) for families ☐ One-time activity for students  ☐ Series of activities for students ☐ Field trip ☐ Club | | | |
| Duration: ☐ One-time event or activity ☐ Series of events or activities | | | |
| Most Effective Approach: ☐ Phone call ☐ Email ☐ Complete official request form ☐ Ask colleague or peer for introduction | | | |
| Steps to Establish a Partnership (check off as completed):  ☐ Hold an introductory meeting.  ☐ Offer a tour or visit to the afterschool site.  ☐ If applicable, visit the partner’s site.  ☐ Complete a memorandum of understanding (MOU) to outline partnership details. | | | |



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