

# FINANCIAL BEGINNINGS PROGRAM PARTNERSHIP GUIDELINES

These Program Partnership Guidelines outline the shared expectations and responsibilities of Financial Beginnings (“FB”) and your organization (“Partner Organization”) to ensure the successful delivery of financial literacy education programs. By accessing FB’s programs, the Partner Organization commits to following these guidelines, which define the roles and responsibilities of both parties for an effective and collaborative partnership.

## FINANCIAL BEGINNINGS’ COMMITMENT



### Trained Presenter

FB will assign a trained presenter lead all classes.



### Learning Materials

FB will provide all FB program materials necessary for an impactful lesson.



### Responsiveness

FB will strive to integrate feedback and suggestions into our programs.



### Support

FB will be responsive to questions and concerns from the Partner Organization.

## PARTNER ORGANIZATION’S COMMITMENT



### Class Scheduling

Request classes at least 4 weeks before scheduled start date.



### Minimum Attendance

Ensure a minimum of 5 attendees per class.



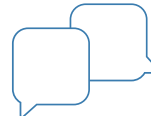
### Start of Class

Introduce the FB presenter and outline the purpose of the class.



### Class Surveys

Present the completion of pre- and post-class surveys by all participants.



### Presenter Connection

Share relevant details, logistics, and expectations with the FB presenter prior to class.



### On-Site Presence

Ensure a representative from your organization remains in the room to assist with participant needs and manage any behavioral issues.

## BOTH PARTIES’ COMMITMENT



### Open Communication

Commit to proactive and responsive communication.



### Class Cancellation

Provide at least 3 business days’ notice if a class needs to be canceled, rescheduled, or modified.



### Post Class Follow-Up

Participate in feedback exchanges to support continual improvement in program delivery and participant engagement.