



Creating Your Story for Financial Institution Partnerships

Organization Overview

Organization Name

Organization Mission

Organization Budget

Organization Staff Capacity (number of staff and key leadership)

Describe primary clients served (e.g., people with disabilities, communities of color, family members, general)

Number of clients served by organization

Neighborhood/Community served by organization

Describe key services provided by your organization

Organization's Achievements (four bullet points on measurable and impactful of goals achieved)

Examples of Partnership and Collaborations

Gaps in Serving the Needs of the Community

Description of program idea, goals and objectives to fill the gap

Partnership ideas to fill in the gaps

Clientele the partnership will serve

Strategy to verify demographics of the clientele are LMI (ex. number of individuals receiving Medicaid, SSI, or SNAP)

Anticipated success and outcomes (four bullet points on measurable and impactful results)

Goals and Objectives

Short

Intermediate

Long-Term

Roles/Responsibilities of Each Partnering Organization

How could financial institutions be most helpful to the program/initiative (e.g. mentoring, grants, serving on the board/advisory committee, providing financial education, etc.)?

Identify services provided by financial institutions in targeted communities
