



## TIPS FOR WORKING WITH COMMUNITY ORGANIZATIONS

This tip sheet may be used to provide guidance when requesting support from a variety of community organizations, e.g., financial institutions, Parent Teacher Association, social service agencies, and philanthropic organizations (P.E.O., Rotary, etc.). FEFE has focused on financial institutions because they are a natural partnership to contribute to financial education.

Financial institutions offer community support through the Community Reinvestment Act (CRA). The act was established as a vehicle for moderate to low-income persons to acquire credit. Many financial institutions have taken this a step further by providing financial support to community programs whose mission is to promote and educate consumers about money management. The following is a brief outline on how to approach and request funding from an organization.

- ★ Review conference registration packet and choose which session(s) to attend and calculate the possible costs associated with attending. <http://fefe.arizona.edu/trainingSeminars.php>
- ★ Contact a financial institution or community organization in your community, preferably one at which you or your organization is an established customer or member.
- ★ Ask to speak with the bank manager, marketing manager, or supervisor.
- ★ Learn what the guidelines are for requesting donations.
  - ★ “How do they disseminate funding through the CRA?”
  - ★ “What must be included in your request?”
  - ★ “Is there a packet of information that outlines the details for requesting funds?”

Financial institutions and community organizations vary on how they disseminate money for special projects. If their goals are not in line with your request, learn how often they reprioritize and set new institutional goals.

- ★ Follow guidelines closely when completing your request. Family Economics & Financial Education has developed a **letter** and **talking points** to assist you in this process.
  - ★ If you decide to use the letter, be sure to change the **bolded fields**. You should add information indicating how the training will benefit you and your students and community. In addition to indicating how you can promote the organization for providing financial support.
  - ★ The talking points may be used for a formal presentation or to supplement your request. FEFE has presentations available to assist you when preparing for a formal presentation.
  - ★ The materials should be used and modified any way you see fit.
- ★ Have a friend or colleague proofread your application before submitting.
- ★ If your application is denied, follow-up with a call to learn what may have been wrong with the application. Do not give up. Contact other organizations in your area.
- ★ If you have questions regarding this process please contact us at [FEFE@cals.arizona.edu](mailto:FEFE@cals.arizona.edu). GOOD LUCK!!