

School Outreach & Implementation Guide



Step 1: Make the Introduction Call

- Start by calling the schools you've identified. Introduce your financial institution and let them know their school has been selected for a year of sponsored financial education through My First Nest Egg. Briefly highlight that the program is completely free and includes easy-to-use classroom resources. The goal is to create a warm connection, spark interest, and prepare them for the follow-up letter.



Step 2: Send the Sponsorship Letter

- After the call, send the official sponsorship letter included in your outreach materials. This letter explains the program benefits, what's included, and how easy it is for teachers to get started. Personalize it with the school's name and your institution's contact information.



Step 3: Gather Key Email Contacts

- Use school websites, phone calls, or existing connections to collect email addresses for key staff—typically the principal, assistant principal, or curriculum coordinator. Add them to your outreach list for monthly communications. Teacher emails are especially helpful, as they allow for direct sharing of lesson plans and activities.



Step 4: Follow Up and Offer Support

- Within one to two weeks, follow up by phone, email, or in person. Ask if they've had a chance to review the materials and offer to walk them through a sample lesson. Reinforce that the curriculum is easy to implement—just a few minutes a day can make a big impact. If you're visiting in person, bring printed materials to leave behind—especially that month's featured printable, which is always a hit with teachers and students.



Step 5: Offer an In-Class Lesson

- Reach out via phone, email, or during your visit to offer to come into a classroom and teach one of the financial education lessons included in the My First Nest Egg materials. Delivering a lesson in person is a great way to build excitement, model how simple the program is to use, and show your institution's commitment to supporting financial literacy.



Step 6: Stay Engaged with Monthly Communication

- Maintain regular contact throughout the school year. Use the monthly email templates and resources provided by My First Nest Egg to highlight new activities, share tips, and keep the partnership top of mind. Your consistent support makes all the difference.