

# Personal Finance Program Assessment

## A Checklist for School Libraries & Districts

Use this checklist to evaluate your school or district's standalone personal finance curriculum. It highlights strengths, uncovers gaps and supports continuous improvement in meeting your state's financial literacy graduation requirements.

### 1. Instructional Design & Delivery

Our current program is designed for both teacher-led and independent learning. Students can progress at their own pace when needed. The content is appropriate for learners with no prior financial knowledge. Lessons are short enough to keep all learners engaged and feature a combination of text, video, practice and interactive elements to support different learning styles.

### 2. Student Engagement & Learning Experience

Students have access to interactive, multimedia content such as videos, calculators and real-world scenarios. Lessons are available in short, approachable formats. The program offers a modern, intuitive user experience.

### 3. Content Organization & Ease of Use

Content is centralized in one cohesive, easy-to-navigate platform. Materials are NOT spread across platforms (e.g., Google Docs, Google Slides, etc.). Students can easily find lessons without requiring teacher intervention.

### 4. Curriculum Flexibility & Real-World Relevance

The curriculum covers life-stage financial decisions relevant to young adults. Content is updated regularly to reflect new tools, apps and financial realities. Lessons support practical, real-world application rather than theoretical-only instruction. Students can revisit or review content independently as needed.

## 5. Assessment & Feedback Quality

- Assessments provide immediate, auto-scored results.
- Assessments are aligned to national personal finance standards.
- Students receive personalized feedback or recommended study actions.
- Teachers are not required to manually grade diagnostics or tests.

## 6. Student Ownership & Skill Validation

- Students have a personal dashboard showing lessons completed and in progress.
- Certificates of completion are available to validate learning.
- Students can revisit or review content independently as needed.

## 7. LMS Integration & Workflow Efficiency

- Our personal finance program integrates with our LMS (e.g., Canvas, Blackboard, Brightspace).
- Units can be embedded directly into LMS modules.
- The program helps reduce teacher workload rather than increase it.

## 8. Equity, Accessibility & Language Support

- All content meets WCAG/508 accessibility standards.
- Accurate Spanish translations and captions are available and can be turned on or off as needed.
- All students can access content seamlessly on mobile devices.

## 9. Reporting, Tracking & Accountability

- Student progress can be tracked across classes or buildings.
- Usage analytics are available at both school and district levels.
- The program supports reporting needs for administrators or compliance purposes.

## Looking to Strengthen Your Existing Personal Finance Program?

**FinancialFit** offers a modern, mobile-first platform with short personal finance lessons, interactive tools, assessments with immediate feedback, real-time progress tracking and LMS integration — an ideal supplement for schools using NGPF or other print-first curricula.