

Personal Finance Readiness Checklist for School Libraries & Districts

Ensure your school is prepared to support standalone personal finance graduation requirements.



Library & District Readiness Essentials

1. Review Your State's Personal Finance Requirement

Confirm whether your state is fully implemented or in progress.

Identify expectations for curriculum content, assessment and reporting.

Note district-specific rollout guidance.

2. Audit Existing Financial Literacy Resources

List available materials and identify gaps in key topics.

Evaluate whether materials include videos, calculators, worksheets, or checklists for real-world application. (Be sure to flag outdated or text-heavy content.)

Confirm that lessons are short enough to support self-paced, independent learning.

Determine whether teachers rely on librarians for supplemental curation.

3. Assess Accessibility & Equity Across Schools

Ensure all students have equal access to resources.

Validate that materials support multilingual learners with accurate translations or captions.

Ensure that students can access content on mobile devices, in or out of the classroom.

4. Ensure Alignment with National Standards

Check coverage of essential personal finance competencies.

Confirm that assessments are scored and support measurable learning outcomes.

Ensure resources support both independent and classroom learning.

Implementation Support Checklist

5. Evaluate Student Engagement Tools

- Look for interactive, relevant lessons.
- Ensure content covers modern financial realities.
- Prioritize formats that improve retention.

6. Identify Tools That Reduce Workload

- Prioritize turnkey, ready-to-use solutions with pre-built lessons and clearly labeled topics or categories.
- Avoid resources that require heavy customization.
- Ensure resources do not require prior financial knowledge from educators to facilitate learning.
- Confirm ongoing content updates.

7. Confirm Reporting & Accountability Capabilities

- Determine how student progress will be tracked.
- Ensure district-level reporting is available.
- Confirm you can demonstrate compliance across schools.

8. Plan for LMS Integration

- Identify LMS platforms in use.
- Verify compatibility with LTI standards for seamless embedding of units.
- Check whether the platform offers completion certificates to help validate student learning.
- Ensure ease of adoption for teachers.

9. Build a Sustainable Year-to-Year Strategy

- Choose solutions with long-term value.
- Ensure the resource provider updates content regularly to reflect changes in financial systems, apps, regulations and best practices.
- Maintain relevance as standards evolve.

Looking for a Ready-to-Use Solution?

FinancialFit offers 160+ short, engaging microlessons; interactive tools and videos; scored assessments; Spanish-language support; and district-level analytics in a modern, mobile-first platform. Its turnkey design helps school librarians and district coordinators meet personal finance graduation requirements with confidence and consistency.