# 

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## Forward Together





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## AGENDA

- SPEAKER INTRODUCTIONS
- TOPIC OVERVIEW Financial Education Legislation Landscape
- EXPERT VIEW Hear from our guests, Adam Motter and Susan Bistransin
- PANEL DISCUSSION
- CLASSROOM RESOURCES
- Q&A



### District Strategies to Master Financial Literacy Mandates



#### Adam Motter

Learning Specialist, K-12, Social Studies & Physical Education Akron Public Schools



#### Susan Bistransin

Financial Education and Empowerment Coordinator Prince George's County Public Schools



#### **Diana Bravo**

Vice President, District Relationships EVERFI



### Kaitlin Boldt

Director, K12 District Partnerships EVERFI S

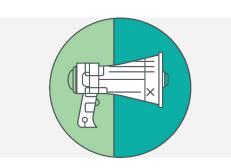
### **Financial Education Landscape**



### **Financial Education Legislation in 2022**



Seven states now require a stand-alone financial literacy course as a high school graduation requirement



**Five additional states'** requirements take effect in the next year or two



25 states mandate at least some financial training, sometimes as part of an existing course



This year, another 20 states have considered setting or expanding similar rules

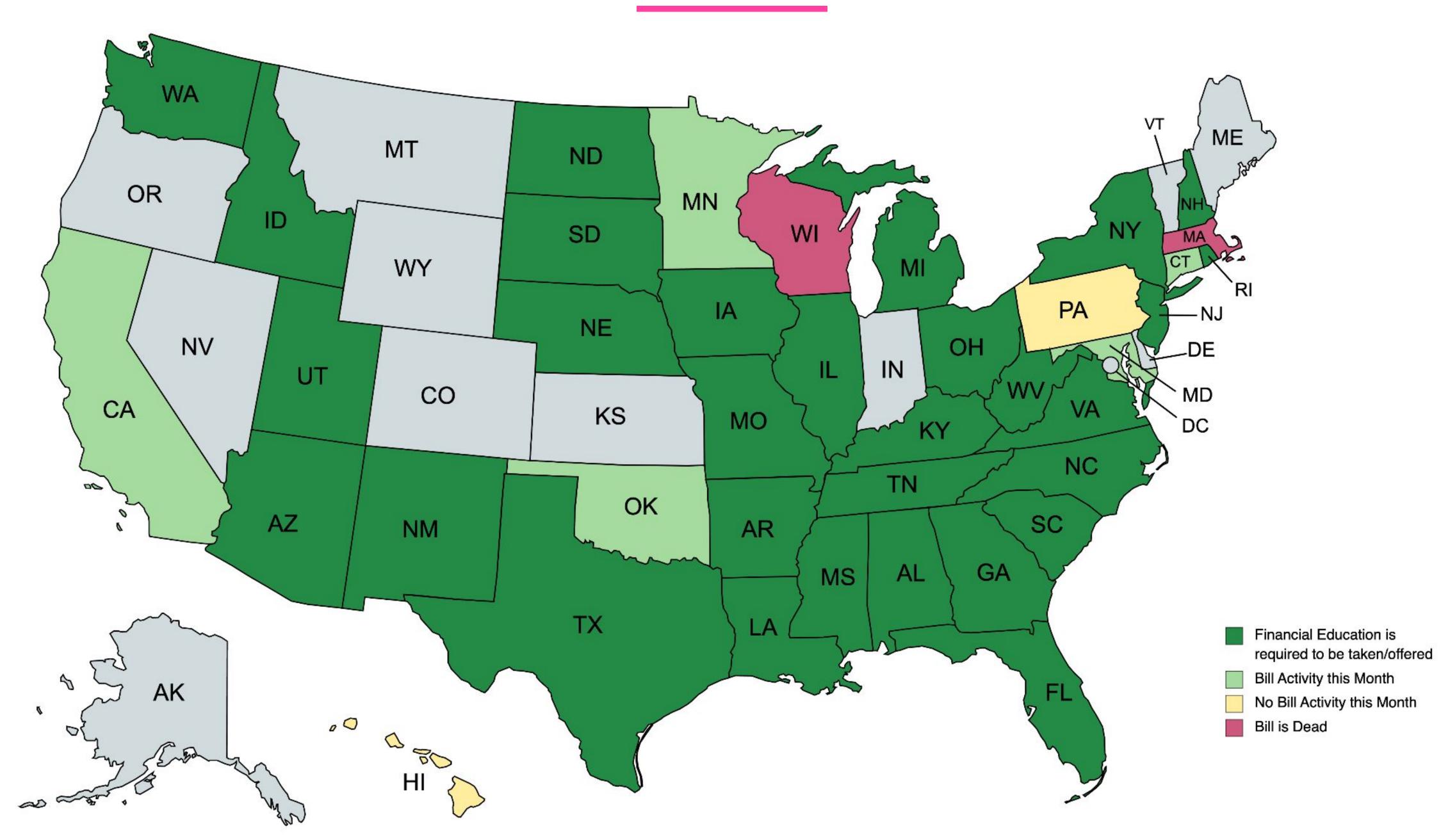


34 states and the **District of Columbia** have had bills addressing financial literacy in the 2021-22 legislative sessions





### **Financial Education Legislation**



7



COVID really opened peoples' eyes to how financially precarious people are, in the way they live their lives. In addition to that, it's gotten really easy for anyone, including teenagers, to buy stocks and crypto. You're dealing with youth that can, in 10 minutes, open a Robinhood or a Coinbase account. So these concepts are even more important now.

- John Pelletier, Center for Financial Literacy, Champlain College





### **Recent State Legislation**

to mandate personal finance education in high school

Ohio just became the largest state to require personal finance education in schools

Michigan is poised to become 14th state to mandate personal finance education

# Florida just became the largest state

New Georgia law requires high school students to take financial literacy

ACCORDING TO: NEXT GEN PERSONAL FINANCE



### Expert View: Adam Motter, Akron Public Schools



## Expert View: Susan Bistransin, Prince George's County Public Schools



## About Susan - General Role and Info



Susan Bistransin, NBCT Financial Education and Empowerment Coordinator Prince George's County, MD National Board Certified Teacher, 2007, 2018
35 years classroom teaching experience
Financial Literacy mandate advocate
Md Council on Econ Ed Financial Capability Educator of the Year, 2015
Teacher Mentor
Society for Financial Education and Professional Development Curriculum Advisor.

**Prince George's County Public Schools** 131,657 students Prince George's County, MD



### PGCPS FINANCIAL LITERACY PROGRAM

- April 2020: PGCPS Board of Ed makes a semester course in Financial Literacy required for the class of 2024
- . April 2021: Next Gen Personal Finance awards PGCPS a 3-year grant to fund a financial literacy specialist position, hired in Aug 2021
- . School Year 2021-22: All schools teach a semester course in Financial Literacy to students beginning in grade 10.





## Curriculum Model: Partnerships





- **1. Next Gen Personal Finance**
- 2. Take Charge Today
  - Curriculum, PD for teachers, Demonstration videos for teachers
- 3. EverFi
  - for students
- 4. Md. Council on Economic Education
  - Stock Market Game, Personal Finance Challenge, PD for teachers





#### • Curriculum, Professional Development for Teachers, Contests for Students

• Certification program, Curriculum, Webinars and Scholarship opportunities

Teachers are also provided with a website containing all curriculum and PD information





## School Year 21-22

PGCPS HIGH SCHOOL PROGRAMS	PGCPS FIN LIT TEACHERS	PGCPS STUDENTS
28	56	8405

## TEACHER PROFESSIONAL DEVELOPMENT HOURS PGCPS-HOSTED PD: 345 HOURS NGPF ON DEMAND AND CERTIFICATION COURSES: 473 HOURS MCEE PROGRAM TRAININGS: 42 HOURS



## **Expert View:** Ryan McAllister, Intuit





## About Ryan - General Role and Info



Ryan McAllister Title Intuit

Ryan McAllister leads Partnerships and GTM strategy for Intuit's Job Readiness Program. The Job Readiness Program is a key pillar of Intuit's Corporate Responsibility Strategy which aims to Power Prosperity Around the World through Career & Financial Readiness programs.

Ryan has an undergraduate degree in International Business from San Diego State University; and an MBA from University of Southern California. Ryan currently resides in Kauai, Hawaii with his wife and 2 children.

Ryan's role includes:

- Oversees Strategic Partnerships where Intuit's resources are implemented with educators and their students; - Oversees School District/Board relationships around the world - Serves an Innovation Catalyst with deep expertise in Design Thinking, Entrepreneurship and Personal Finance.



## Panel Discussion



### District Strategies to Master Financial Literacy Mandates





#### Susan Bistransin

Financial Education and Empowerment Coordinator Prince George's County Public Schools Learning Specialist, K-12, Social Studies & Physical Education Akron Public Schools

#### **Adam Motter**

## REPLACE TITLE

 Tell us about the financial education legislation in your state. How has it impacted your district's financial literacy curriculum?

What are your district's biggest priorities within financial education?

What challenges have you faced in implementing the curriculum?

 What has the feedback from teachers and students been like? Any stories of impact you'd like to share?







# Questions?





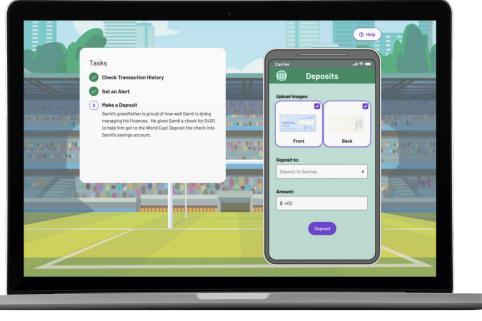


### High School Financial Wellness Suite

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A day ago	\$109.00	shoes 🏲	\$00.00
Hern 1	-\$50.00	ITEM 3	\$00.00
2 days ago	\$159.00	ITEM 4	\$00.00
Cell Phone 🥏	-\$45.00	RESTAURANT	\$00.00
Adays ago	\$204.00		
Hern 2	-\$23.00		

**EVERFI: Financial Literacy** *Grades 9-12* 







**Venture: Entrepreneurial Expedition** *Grades 7-10* 

#### Marketplaces: Investing Basics Grades 9-12

#### Money Moves: Modern Banking & Identity Protection ® Grades 9-12

**Pathways: Financing Higher Education** *Grades 9-12* 







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