



The Florida Senate

Local Funding Initiative Request

Fiscal Year 2025-2026

LFIR # 2854

1. Project Title

2. Senate Sponsor

3. Date of Request

4. Project/Program Description

Planned to A.T. is a nonprofit organization whose mission is to serve young people to improve their futures through financial wellness education. Due to The Florida Senate Bill 1054, Duval County Public Schools is required to teach financial literacy as part of their high school curriculum. This requirement falls on the social studies teachers, which means they are expected to deliver content outside of their typical expertise. Our curriculum provides 21 hours of interactive standards-based learning created by former educators who understand the stress that adding an extra requirement to a teacher's plate can cause. It makes it simple for teachers to deliver financial literacy on top of their typical courses/duties. This funding would support the expansion of our curriculum into two more high schools in Duval County for the 2025-2026 school year.

5. State Agency to receive requested funds

State Agency contacted? Yes No

6. Amount of the Nonrecurring Request for Fiscal Year 2025-2026

Type of Funding	Amount
Operating	50,000
Fixed Capital Outlay	0
Total State Funds Requested	50,000

7. Total Project Cost for Fiscal Year 2025-2026 (including matching funds available for this project)

Type of Funding	Amount	Percentage
Total State Funds Requested (from question #6)	50,000	29%
Matching Funds		
Federal	0	0%
State (excluding the amount of this request)	0	0%
Local	0	0%
Other	125,000	71%
Total Project Costs for Fiscal Year 2025-2026	175,000	100%

8. Has this project previously received state funding? Yes No

If yes, provide the most recent instance:

Fiscal Year (yyyy-yy)	Amount		Specific Appropriation #	Vetoed
	Recurring	Nonrecurring		
	0	0		No

9. Is future-year funding likely to be requested? Yes No

a. If yes, indicate nonrecurring amount per year.

b. Describe the source of funding that can be used in lieu of state funding.

Grants and corporate sponsors.



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Complete questions 10 and 11 for Fixed Capital Outlay Projects

10. Status of Construction

a. What is the current phase of the project?

- Planning
 Design
 Construction
 N/A

b. Is the project "shovel ready" (i.e permitted)?

c. What is the estimated start date of construction?

d. What is the estimated completion date of construction?

e. What funding stream will be used for ongoing operations and maintenance of the project?

11. List the owners of the facility to receive, directly or indirectly, any fixed capital outlay funding. Include the relationship between the owners of the facility and the entity.

12. Details on how the requested state funds will be expended

Spending Category	Description	Amount
Administrative Costs:		
Executive Director/Project Head Salary and Benefits		0
Other Salary and Benefits		0
Expense/Equipment/Travel/Supplies/Other		0
Consultants/Contracted Services/Study		0
Operational Costs		
Salary and Benefits	Planned to A.T. curriculum training teachers, coordination of partners to provide speakers and incentives for students who meet their financial goals, and data analysis of student performance.	20,000
Expense/Equipment/Travel/Supplies/Other	Curriculum access for teachers and students.	30,000
Consultants/Contracted Services/Study		0
Fixed Capital Construction/Major Renovation:		
Construction/Renovation/Land/Planning Engineering		0
Total State Funds Requested (must equal total from question #6)		50,000

13. Program Performance

a. What specific purpose or goal will be achieved by the funds requested?



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The main goal of our curriculum is to make it as easy as possible for teachers to tackle this new requirement, meet the Florida teaching standards, and for students to truly be engaged. Our curriculum is designed to not just teach concepts but reward implementation of healthy financial habits in real time. Thanks to our partners like The Jacksonville Jaguars students can work towards game tickets and apparel as they meet their financial goals. We've partnered with The Jags to sponsor this curriculum pilot at Andrew Jackson and Ed White Spring 2025. This funding would support the curriculum implementation in two more Duval County Schools for the 2025-2026 year.

b. What activities and services will be provided to meet the intended purpose of these funds?

Teachers will receive a training video and all course materials. They will have the opportunity to join a live Q&A session with Planned to A.T. as a follow up. Students will cover topics such as evaluation of spending, need vs wants, budgeting, reading paystub and bank statements, taxes, and setting financial goals. Each topic require them to practice in real time with their finances. Teachers will have an allotted amount of time to implement curriculum and towards the end of the program participating classes will receive incentives from various community partners.

c. What direct services will be provided to citizens by the appropriation project?

Proven effective financial wellness education that has the potential to shift the state of lower-income communities over time.

d. Who is the target population served by this project? How many individuals are expected to be served?

Approximately 300 students between two different Title I Schools will benefit from this program.

e. What is the expected benefit or outcome of this project? What is the methodology by which this outcome will be measured?

Teachers will be able to implement financial literacy with ease and students will learn and meet the state requirements associated with the course. We use a surveys at the beginning and end of our program for both the teachers and students. Teachers report on the ease of use of materials, student engagement and retention of concepts learned. Students report on engagement, concepts learned, and habit implemented.

f. What are the suggested penalties that the contracting agency may consider in addition to its standard penalties for failing to meet deliverables or performance measures provided for in the contract?

Return any funding that is not used for the purposes outlined in this proposal.

14. Is this project related to mitigation, response, or recovery from a natural disaster?

a. If Yes, what phase best describes the project?

- Mitigation (reducing or eliminating potential loss of life or property)
- Response (addressing the immediate and short-term effects of a natural disaster)
- Recovery (assisting communities return to normal operations, including rebuilding damaged infrastructure)

b. Name of the natural disaster (or Executive Order # for events not under a federal declaration):

15. Has the entity applied for or received federal assistance for this project?

- Yes, Applied
- Yes, Received
- No
- No, but intends to apply



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a. If yes, provide the FEMA project worksheet ID#:

b. Provide the total project cost listed on the FEMA project worksheet:

16. Has the entity applied for or received state assistance for this project (other than this request)?

- Yes, Applied
- Yes, Received
- No
- No, but intends to apply

a. If yes, specify the program and state agency (ex. Local Government Emergency Bridge Loan, Department of Commerce):

17. Requester Contact Information

a. First Name Last Name

b. Organization

c. E-mail Address

d. Phone Number Ext.

18. Recipient Contact Information

a. Organization

b. Municipality and County

c. Organization Type

- For Profit Entity
- Non Profit 501(c)(3)
- Non Profit 501(c)(4)
- Local Entity
- University or College
- Other (please specify)

d. First Name Last Name

e. E-mail Address

f. Phone Number Ext.



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19. Lobbyist Contact Information

a. Name

b. Firm Name

c. E-mail Address

d. Phone Number

The information provided will be posted to the Florida Senate website for public viewing if sponsored by a Senator.