

Project-Based Unit Planning Template

TITLE: Financial Management	TEACHER: Karen Bear	COURSE: Business Principles II	DURATION: 8 days – block schedule
CONTENT—What will students learn?			
Career/Technical Knowledge and Skills	Academic Knowledge and Skills	21st Century Skills	
<p>Demonstrate knowledge of the fundamentals of financial information i.e. income statement and balance sheet</p> <p>Determine critical information needed to make a financial decision</p> <p>Calculate financial performance ratios</p> <p>Calculate payroll</p> <p>Analyze company data to determine company success and investment feasibility</p>	<p>Reading: Gather, analyze, organize and interpret information for the purpose of drafting a reasoned report</p> <p>Writing: Summarize information in a cohesive, succinct manner</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Understandings:</p> <ul style="list-style-type: none"> Every business is guided by the basic financial equation: <i>Revenue – Expenses = Profits</i> Every business activity costs money. Without careful planning and management those costs can grow to a level where the business cannot cover the expenses and could fail. Everyone in a business should be concerned with reducing costs. </div>	<p>Communication:</p> <ul style="list-style-type: none"> Use oral and written communication skills in creating, expressing and interpreting information and ideas including technical terminology and information. <i>(Century 21 Skills)</i> Develop and deliver formal and informal presentations using appropriate media and technology to engage and inform audiences. <i>(States' Career Cluster Initiative)</i> <p>Collaboration:</p> <ul style="list-style-type: none"> Demonstrate ability to work effectively and respectfully with diverse teams. <i>(Century 21 Skills)</i> Assume shared responsibility for collaborative work, and value the individual contributions made by each team member. <i>(Century 21 Skills)</i> 	
SCENARIO OR PROBLEM-- What scenario or problem will you use to engage students in this project?			
<p>Our class is an investment bank and we want to invest \$10 million in a company; however, we are not sure in which company we should invest. Using your knowledge of financial records and financial statements and the role these play in financial decision making you will research a company and make a financial decision: invest or avoid.</p> <p>You and your partner will analyze and evaluate a company and two competitors and determine whether we should invest in the company. Select a company and find relevant company information and key financial data. You may use http://finance.yahoo.com, the company's website and any other appropriate site. Create a professional presentation including PowerPoint which clearly proves your decision.</p>			

Adapted from: Project Planning Form, Buck Institute for Education, 18 Commercial Boulevard, Novato, CA 94949, www.bie.org.

ASSESSMENT—How will you determine what students have learned? (Check all that apply)

FORMATIVE		SUMMATIVE	
Quizzes/Tests	X	Multiple Choice/Short Answer Test	X
Notes/Graphic Representations: Mind Maps, Contrast/Compare Chart, Cornell Notes	X	Essay Test	
Rough Draft		Written Product with Rubric	
Practice Presentation		Oral Presentation with Rubric	X
Preliminary Plans/Goals/Checklists of Progress		Other Product or Performance with Rubric: PowerPoint	X
Journal/Learning Log		Self-Evaluation or Reflection	X
Other: Creation of income statement and balance sheet, M&M Balance Sheet Activity, Problems of No Cash Essay, Red Light Green Light Map	X	Evaluation by Authentic Audience	
		Other:	

MATERIALS AND RESOURCES—What materials and resources will be needed?

Computers with PowerPoint

Income Statement and Balance Sheet examples

<http://finance.yahoo.com/q/bs?s=DIS+Balance+Sheet&annual>

<http://financial-education.com/wp-content/uploads/2007/03/attbalancesheet.jpg>

<http://finance.yahoo.com/q/is?s=DIS+Income+Statement&annual>

<http://www.cabrillo.edu/~dambrosini/188Web/images/incomesams.gif>

SUPPORT, MODIFICATIONS, AND EXTENSIONS—What is needed to provide support for students who have difficulty learning the content, modify for students with special learning needs, or to provide enrichment for advanced students?

CALENDAR OF MAJOR LEARNING ACTIVITIES—Briefly describe the learning activities for each day.

Week 1				
Monday	Tuesday	Wednesday	Thursday	Friday
Introduce Project/Unit Red Light/Green Light Map Problems of No Cash essay Cornell Mind Map	Identify types of financial statements Compare and contrast a balance sheet and income statement Categorize balance sheet components - game Cornell Mind Map	Financial Statement Activity Payroll Management Quiz – Formative Payroll Management Practice	Ratios and Financial Management Payroll Management Practice Research	Research Develop Presentations Team Assessment
Week 2				
Develop Presentations PowerPoint Self-Assessment	Presentations Team Assessment	Presentations Self-Assessment Teamwork Rubric Test		

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