

Planning Process Worksheet

Sample completed worksheet

Name(s): _____ Date: _____



IDENTIFY CONCERNS

As part of the "Banking Basics" unit, three members discover that they are interested in learning how to use computer-based financial software. They also agree that adults/families should know more about these programs.



SET A GOAL

By November 1, we will educate ourselves and others to use a financial computer program by trying various programs, learning to use one, and sharing it at the school open house.



FORM A PLAN

WHO: Emily, Jeff, and Kevin

WHAT: 1. visit business education classroom to look at financial computer programs;
 2. choose one to learn more about.
 3. obtain a copy of the program and set it up on FACS computer;
 4. work with the program;
 5. identify pros and cons of using the program;
 6. speak to FACS class about pros and cons;
 7. prepare 10-minute lesson for parents/adults;
 8. arrange to present lesson during school open house, using computer lab;
 9. prepare handout for parents to take home;
 10. practice presenting the lesson.

WHERE: business education classroom; FACS classroom; school computer lab

WHEN: 1. By September 20; 2-5 by September 30; 6. October 10; 7-10 by October 30.

HOW: team will work together on project days during FACS class and will complete individual work between these work sessions



ACT

The team carries out its plan. When they miss their second deadline, the three decide to work together one day after school to catch up and get back on schedule. On November 1, more than 100 parents observe the 10-minute lessons given by the team members in the school computer lab.



FOLLOW UP

Team members thank everyone who helped. They prepare a Press Release about their project and complete the Project Evaluation Grid. They also send in the Financial Fitness Report Form. The team decides to present its project as an "Applied Technology" STAR Events entry.