

# FIN2325 – Financial Services Applied Project Course

## Community Financial Literacy Project – Sample Student Project

Name of Community Partner: Options Bytown

Name of Group Members: Student A, Student B, Student C

Name of Mentor Partner: Rania Zammar, Branch Manager RBC Royal Bank

### **Background**

Here, students would provide an overview of Options Bytown, referencing the website for mission, and client overview.

### **Initial Meeting**

Date:

Attendance: (students, mentor and clients by pseudonyms)

### **Description**

Here, students would outline and describe the location of the meeting (such as downtown, secure building) features specific to the organization, (clean, well equipped lounge, cool art work, fun activities board, pizza smelled great) and impressions, (friendly staff, high level of support physical and emotional, tenants have independence, and their voice is sought on issues that are important to them).

Next, students would summarize the conversation. Highlight key pain points, identify themes and needs that surfaced. Rank, in order of potential 3 areas of concern that can be met with a financial literacy workshop.

- Use of Money Mart – high interest rates, predators at exit
- Limited budgeting skills – money runs out before month end
- Estate planning and wills\*
- Limited funds for purchasing furniture, housewares, and linens – fundraising event\*
- Fraud awareness – target for phone and other scams

\* Some concerns can be re-directed to other work placement opportunities at the college, such as Paralegal/Law Clerk, Events Management

### **Project Plan**

Students to provide a timeline and plan of deliverables with the support of Professor and Mentor

### **Research**

Students to collect, adapt and modify financial literacy tools found through FCAC, Mentor partner, and other resources. Primary (in-person interviews, by Zoom or phone if F2F is not available) and secondary research of relevant, timely resources. APA formatting for reference page.

## Lesson Plan

Using the BOPPPS template, students submit a lesson plan, activities, presentation, and other media for the delivery of the workshop.

BOPPPS	Context	Lesson Component Breakdown	Time
<b><u>B</u>ridge-in</b>	How will you break the ice, gain interest, introduce the workshop?		
<b><u>O</u>bjectives</b>	What will participants achieve/be able to demonstrate upon completion?	Agenda:  Learning Outcomes:	
<b><u>P</u>re-Assessment</b>	How will you determine what participants already know about the topic?		
<b><u>P</u>articipatory Learning</b>	What learning activities will take place to enable participants to achieve the outcomes? This section includes both what/how you will be teaching, as well as the activities you will use		
<b><u>P</u>ost-Assessment</b>	How will participants demonstrate their learning?		
<b><u>S</u>ummary</b>	How will you wrap-up and summarize?		

## Presentation

Workshop should be up to 3 hours in length, depending on audience. Presentation, such as PPT, workbook pages, handouts, etc. should include a combination of images or illustrations and text. Presenters should prepare to have a conversation rather than a lecture. Presentation should enhance and provide speaker cues, not present 100% of the material alone. Quiz to check understanding

Minimum presentation requirements:

Image or illustration on each slide, min 5 max 10 slides, no more than 20 words per slide. Quiz, game, or puzzle to test understanding before and/or after lesson is concluded.

## **FCAC Tools Sample**

Students would start with the available tools and resources available through FCAC. Research should include other resources from a variety of sources. Many of the calculator tools require access to a computer, session would have to be conducted at the Ottawa Public Library or College with temp student accounts.

Based on the initial meeting with clients at Options Bytown, the following tools would be identified as potentially useful for adaptation and delivery.

<https://itools-ioutils.fcac-acfc.gc.ca/FLSAT-OAELF/star-comm-eng.aspx>

<https://www.canada.ca/en/financial-consumer-agency/services/estate-planning/will-estate-planning.html>

<https://itools-ioutils.fcac-acfc.gc.ca/BP-PB/budget-planner>

[https://www.canada.ca/en/financial-consumer-agency/news/2017/04/consumer alert\\_becautiouswhenseekinghelptopayoffdebtorrepairyour.html](https://www.canada.ca/en/financial-consumer-agency/news/2017/04/consumer_alert_becautiouswhenseekinghelptopayoffdebtorrepairyour.html)

<https://www.antifraudcentre-centreantifraude.ca/features-vedette/2021/03/fraud-prevention-fraude-eng.htm>

**See full assignment rubric for grade distribution**