***Party planners (level 1+)***

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| **Context for learning**In this unit, students will take a leading role in planning, budgeting and fundraising for a class party. During the first stage of the unit students will brainstorm options for the class party drawing on their prior experiences of birthday parties and other celebrations. They will then liaise with an event manager and understand what they will need to accomplish as organisers of a class party. As a class they will evaluate several different party ideas (considering food options, drinks, games, music and decorations, etc) by carrying out statistical investigations to find out student preferences. Students will then investigate the costs of holding a class party by making phone calls, using e-mail and visiting supermarkets/food wholesalers to gather information and negotiate prices. The class will come up with an overall budget for the party and work collaboratively to raise money to cover the costs. Students will record their income and expenditure using a simple cashbook template. Approximately 12 lessons |
| **Learning areas**English, Health & PE, Mathematics**Learning outcomes**Students will be able to:* Carry out a statistical enquiry to identify the preferences of their classmates.
* Communicate effectively with people in oral and written forms to gather and share financial information and make purchases.
* Carry out required duties alongside others in a responsible manner to raise money for a fundraising venture.
* Keep accurate records of the class’s income and expenditure using the cashbook format.
* Identify when key financial messages are being demonstrated.
 | **Financial capability progressions**Money* Identify the benefits of saving money.

Spending* Explore simple interest through hands on activities.

Budgeting and financial management* Make simple budget choices that prioritise 'needs' and 'wants'.

Setting financial goals* Set a financial goal as part of planning a project or activity and identify the steps needed to attain it.
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| [Key competencies](http://nzcurriculum.tki.org.nz/Curriculum-resources/Financial-capability/Financial-capability-and-the-NZC/Curriculum#3)**Thinking*** Evaluating financial decisions and their consequences.

**Participating and contributing*** Collaborating to carry out a project.
* Providing feedback on others' decisions.
 | [Values](http://nzcurriculum.tki.org.nz/Curriculum-resources/Financial-capability/Financial-capability-and-the-NZC/Curriculum#4)**Excellence*** Recognising the implications of having more or less money.

**Inquiry**Thinking creatively, critically, and reflectively to:* analyse and solve financial problems,
* set and achieve personal financial goals.

**Community** **participation*** Considering personal contributions to community goals.
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| **Resource requirements*** Simple cash book template, decision grid (available in the ‘Supporting Templates’ download at: [http://education-for-enterprise.tki.org.nz/Resources,-tools,-templates/Financial-capability/Resources](http://education-for-enterprise.tki.org.nz/Resources%2C-tools%2C-templates/Financial-capability/Resources))
* A Bank spokesperson

**Taster and starter\* suggestions*** My very own piggy bank
* The best dressed bear competition
* Working at the car wash
* Mother’s day cards

\*Available at <http://education-for-enterprise.tki.org.nz> |
| **Getting started**The teacher asks students to think about their favourite birthday party (this could be their own birthday party or a party that they attended as a guest). Students share their memories of this event – prompt students to remember details about the food, drinks, decorations, games, music, etc). Students draw a picture of themselves at the party and the teacher or student write a caption to go with the picture. These pictures are shared and displayed. The teacher explains to students that they are going to take a leading role in planning, budgeting and fundraising for their own class party. The teacher and students decide what the party will be celebrating (it could be to mark the end of term, to celebrate a cluster of birthdays, to welcome a new student or staff member, to congratulate a student on a special achievement, etc). The teacher and the students begin to brainstorm a range of ideas for the party including food, drinks, games, decorations, theme, music, etc. A date is set for the party and marked on the class calendar. **Deciding details for the class party**1. An event manager is invited to the class to act as a mentor to the students during the unit. The event manager talks to the students about their job, the steps they take to organise the event and describes some of the events that they have coordinated. They then offer students advice on how to organise a class party. The event manager and the students list all the tasks that will need to be completed to enable the party to go ahead. The event manager assists the students in ordering the tasks and plotting them onto a timeline. NB: The remaining steps in this teaching and learning sequence assume a logical approach to the organisation of a class party. It is recommended that these steps are included within the timeline. The event manager, teacher and students may add additional steps and/or rearrange the order of some tasks.
2. The class revisits the brainstorm that was drawn up at the ‘Getting Started’ phase of the unit and adds any further ideas.
3. Students are arranged into cooperative groups to conduct a statistical investigation into one aspect of the party (e.g.: food, drink, music, games, theme, decorations, etc). The purpose of this activity is to determine the preferences of the class/guests. Students will need to use the ideas generated in the brainstorm (plus any additional ideas that they think of) and write a questionnaire for members of their class to record their preferences. Students will conclude which ideas are the most popular. The teacher may need to model how to conduct a statistical enquiry before the students can work independently on this task. This will be dependent on students’ prior learning. (Learning Outcome 1)
4. Students share the results of their statistical enquiry with the rest of the class. The teacher and the students work together to narrow down the options for the party by cutting out any ideas that were unpopular. (LO 1.)
5. The students spend several lessons investigating the feasibility of particular party ideas, for example, finding out the costs and preparation requirements of popular party food, finding out the availability and cost of popular drink options, establishing the availability and cost of resources for favourite games, etc. Students will need to contact local shops (via the telephone, e-mail or an actual visit) to enquire about the costs of particular products. They will also need to estimate the required quantity of food and drink items to calculate an overall cost for each option. (Learning Outcome 2).

***The teacher may need to add in additional lessons before step 5 to explore appropriate telephone manners with students and ensure that they can write effective e-mails, faxes and/or letters. This will be dependent on students’ prior learning.*** 1. Students record their findings on large posters (one poster outlining the cost and any special preparation requirements of food options, one poster for the cost of different drink options, etc). The class uses a decision grid for each category to decide which party options are the best. Criteria for the grids could include: The cost of the option is affordable; most students/guests like this option; the option would not take too much preparation time, we have the necessary resources to provide this option, for example, fridge space, oven, etc. (LO 2.)
2. Students make final decisions on what food, drink, music, decorations, and games, etc, they will include at their class party and then calculate the overall costs for the party and present these in a class budget.

**Raising the funds**1. The teacher and students begin to research fundraising and sponsorship opportunities for the class party. They may choose to ask older students to come and speak to the class about their own fund-raising experiences to gain ideas and information.

 The following Learning Media resource may be useful at this stage of the unit:

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| JJ No. 27 2003 Pgs 20-25Article: We sell feijoasby SCHRODER, Margaret |

NB: A list of fund-raising ideas is included at the end of this unit under ‘Handy Hints.’ 1. Students decide which fundraising and sponsorship options are the most feasible for them to pursue (another decision grid could be used here) and they begin to raise money for the class party. NB: The teacher and students will need to decide if they are going to try to collect enough money to cover the total party costs or just raise a component of the costs and ask parents to contribute the difference. A savings graph is displayed on the classroom wall showing the target amount. This graph is updated regularly to show students that they are getting closer to their savings goal. Students are shown how to use a cashbook and enter the income that the class generates onto a cashbook template. NB: It might be necessary to deal with whole dollar values if students are at an early stage in numeracy. Learning Outcomes 3 and 4.
2. The teacher explains that banks can assist people in saving up for personal goals and keeping their money safe. Students explore how banks might help people with their finances and brainstorm questions that they could ask a spokesperson from their local bank. Questions may include: Where can we put our savings to ensure they are safe? How do I make a bank deposit? What is a personal savings account and how can this be beneficial for me? How do I withdraw money when I am ready to pay for something? A visit by a local bank spokesperson is arranged by the students/teacher and appropriate guidelines and questions are established. The bank representative is informed of the students’ questions and unit of work. NB: The students and teacher may decide to set up a savings account at their local bank branch for their fundraising revenue.
3. The event manager is invited back to the classroom to see the progress that the students have made so far along their timeline. The event manager and the students devise a list of success criteria for the class party and identify further tasks that will need to be completed to ensure that the party runs smoothly. NB: Each student is to keep accurate records of the class’s income and expenditure during this stage of the unit. Learning Outcomes 2, 3 and 4.

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| Possible success criteria for the party | Further tasks that may need to be carried out: |
| * party runs within budget
* enough food and drink is available to students and guests
* students have fun; etc.
 | * writing newsletters to parents to offer information about the class party, including learning intentions, and to seek parent help
* continuing to fundraise or seek sponsorship
* purchasing food and drink
* making decorations for the party
* organising games
* developing health and safety guidelines, etc.
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 1. Students work cooperatively with the teacher to ensure that all tasks are carried out. As spending occurs, transactions are entered into the cashbook.
2. The party is held. Learning Outcome 4.
3. Students evaluate the success of the party by revisiting the success criteria and checking how well they achieved each one. Students check the balance of their ‘savings’ to see if the party ran below, to or above budget.

**Reflective questions****Exploring new knowledge and skills:*** What were important things to remember when you used the telephone or email to find out about prices for the party?
* How easy or hard was it to add up the costs of the party?

**Exploring key financial ideas:** Learning outcome 5* Revisit the key financial messages that were important to this undertaking.
* What were you doing when you think you were being financially responsible?
* How did you all agree on a menu even though you have different preferences?
* What could have happened if you did not do all that financial planning?
* When do you think your class made a financial trade-off? What did you give up because you had a limited budget?

**Exploring what it is to be innovative and enterprising:*** What step/s were you doing when you used each of the enterprising attributes? For example, planning and organising, negotiating and influencing, etc.
* How could you improve on using the enterprising attribute/s for next time?
* Can you use this learning in other topics, and/or outside of school?

**Exploring further future focus issues:** * Fundraising for your class party is an excellent example of social entrepreneurship. Explain the benefits that your spending at the shop had on others. Who benefited by your spending, and why? Can you draw a flow diagram to represent the ‘flow’ of your money after you paid for your party goods at the shop?
* How do you think you can be better citizens in the future from this experience?

**Possible assessment activities (Teacher):****English**Teacher observes and takes anecdotal notes on how well the students gathered and presented information on the particular party options that they investigated. Copies of e-mails written by students could be analysed to see how effectively the student sought information. **Mathematics and statistics** Teacher observes and takes anecdotal notes on how well students use various number strategies to calculate costs. **Key financial messages**Teacher observes/engages in teacher student dialogue/takes anecdotal notes on how well students use various thinking strategies to make financial decisions.Students compare their own cashbook against an exemplar prepared by the teacher. Have they followed correct procedures for recording the class’s financial journey? **Handy hints*** Fund-raising Ideas: Raffles with donated items from home; host a garage sale selling peoples’ unwanted belongings; host a car wash at school – see Taster and Starter activity, ‘Working at the Carwash’; make popcorn and sell it to students at lunch-time; take photographs of a special event at school (e.g. cross country, assembly, swimming sports, dress up day, etc) and sell copies of the photographs to parents; host a dress up day at school with prizes and games and ask students to bring a gold coin donation; etc.
* It might be useful to invite a member of the PTA to offer advice on fundraising – they will have a wealth of experience.
* Party Ideas:

Encourage students to have a theme for the party to make the planning more fun. The theme could tie in with a unit of learning that the class is currently doing. Possible themes could include: Pre-historic times; Being eco-friendly; Fairytales and nursery rhymes; Space; etc. * Once a theme is established the food, drinks, games, decorations, music, etc could all compliment the theme. For example: if Space is the theme …
	+ Food ideas: star shaped sandwiches; a cake iced with blue and green icing to look like planet earth; orange moon sticks (segments of orange skewered on a kebab stick); etc.
	+ Drink ideas: Mars fizz pop (lemonade with red food colouring); Alien juice (lime juice); etc.
	+ Games: Guess the planet quiz (give clues about each planet); Moon Statues (musical statues but students pretend that they are walking around the moon); Rocket Competition (making rockets out of recycled boxes, card and paper) etc.
	+ Decorations: Hanging planets, stars and moons.
* See BEST Resources (<http://education-for-enterprise.tki.org.nz/Resources%2C-tools%2C-templates/Primary-school-resources>) for other units that engage students in financial thinking and decision-making. These are easily adapted to include the key financial messages in their learning.
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