

High School Curriculum Guides

Toronto Finance International has developed a resource section for teachers and students to support the exploration of financial services careers. TFI's [Career Advisor website](#) offers a career assessment tool and detailed information on 35 in-demand jobs. Curriculum Guides have been developed to support teachers to bring this information to their students in an interesting and engaging way.

Curriculum guides had been developed for the following courses (Ontario course code provided):

- Financial Accounting Fundamentals (BAF3M)
- Financial Accounting Principles (BAT4M)
- International Business Fundamentals (BBB4M)
- Introduction to Business Studies (BBI2O)
- Entrepreneurship: The Venture (BDI3C)
- Business Leadership: Management Fundamentals (BOH4M)
- Introduction to Information Technology (BTT101)
- Career Studies (GLC201)

About Toronto Financial International

Toronto Finance International (TFI) is a public-private partnership between Canada's largest financial services institutions, academic institutions and the government. Our organization is the lead voice for the international promotion of the Toronto Financial Centre and the global prominence of our financial services sector.

TFI also acts as a hub for Toronto's financial sector and works with our stakeholders on initiatives which drive the growth and competitiveness of the industry.

Our work spans from helping global financial services firms expand their operations in the Toronto Financial Centre, to working with the financial community, government and academia to foster a globally competitive sector which drives the economic growth of Canada.

TFI's Talent Initiatives

Talent is the engine that drives the Toronto Financial Centre, which employs almost 400,000 individuals, including a growing pool of technology professionals. As global competition intensifies, the ongoing ability to attract, develop and retain world-class talent remains critical to both existing and prospective financial services firms in the Toronto region. TFI works to grow and sustain our long-term talent advantage. We act as a connector - strengthening collaboration and building bridges between our partners. And we act as a catalyst - identifying and strategizing about today's talent challenges, and proposing and leading system-wide initiatives that reap benefits for the sector.

One of TFI's key Talent Initiatives is our High School Strategy to help younger students to uncover the breadth of interesting and innovative opportunities in financial services. These High School Curriculum Guides is an important component of that Strategy. We hope you will find them a useful and engaging tool, and welcome your feedback.

BOH4M: Business Leadership: Management Fundamentals

LESSON: Financial Services & Ethics, Social Responsibility in Management

DURATION: 3 periods x 75 minutes

LESSON: Financial Services & Ethics, Social Responsibility in Management

Time Required: 225 minutes (3 periods x 75 minutes)

Description

This lesson enables students to learn about the Financial Services and Business Management industries. Students will apply the knowledge learned through an investigation of various resources through a Mind Map Placemat activity and Think Pair Share format to share and collaborate their learning.

Also, using a Career Matching Tool to help identify pathways and areas of interest related to the industries noted above, students will utilize digital literacy tools and techniques to learn more about the Financial Services industry and business.

Finally, students will read and present their resource summaries to their groups as a collaborative and shared learning via a placemat format. Alternatively, this can be conducted in presentation format as a formative assessment.

Strands and Expectations

Strands

- Understand the aspects of ethics, leadership and social responsibility within business organizations and structures
- Evaluate resources for usefulness, accuracy and validity of research information for their placemat or presentation formats

Overall Expectations

By the end of this course, students will:

- Demonstrate the use of appropriate communication techniques related to business management
- Evaluate the impact of issues related to ethics and social responsibility in the management of organizations

Specific Expectations

By the end of this course, students will:

- Demonstrate effective use of information and communication technology (e.g., word processing, email, online research tools) for a variety of management purposes
- Demonstrate appropriate techniques for making group and individual presentations (e.g., use a variety of appropriate visual aids, making eye contact, speaking clearly)
- Demonstrate an understanding of management concepts and theories discussed in relation to current business issues in a variety of sources (e.g., newspapers, magazines, documentaries, websites)
- Use proper business vocabulary in oral and written communication
- Demonstrate effective use of business communication documents (e.g., business reports, correspondence)

Equity/Diversity and Social Justice (Teacher Actions)

The teacher will ensure that an environment of inclusiveness, fairness and equitable practice is used in terminology and language.

As per the socio-economic nature of this topic, the teacher should be mindful of their teaching practice and the impact of their language.

The teacher also needs to be mindful of how groups are chosen to ensure that representation from all 4 pathways (University, College, Apprenticeship and Workplace) are in each group.

Planning Notes

- Book the library/resource centre and the computer lab
- Make each student 1 (one) copy of each of the following:
 - Appendix 1.1a: Business Management and Leadership Mind Map Placemat
 - Appendix 1.1b: Financial Services Industry Mind Map Placemat
 - Appendix 1.2: TFI Career Matching Tool Exploration Activity
 - Appendix 1.3: Mind Map Placemat for Resource
 - Appendix 1.4: Mind Map Placemat for Summary of All Resources
 - Appendix 1.6: Exit Card

Prior Knowledge Required

- Students need to have general knowledge of business and the Financial Services industry
- Students need a general understanding of skills, abilities and basic business functions
- Students utilize group-work skills, critical-thinking skills, and oral and written communication skills to complete this activity
- Students need to know the basic skills of conducting research on the Internet, including the use of a browser

Teaching and Learning Strategies

The following teaching and learning strategies comprise this lesson plan:

- Part 1: Minds On
- Part 2: Action
- Part 3: Consolidation

Part 1: Minds On (40 mins)

1. Before the lesson begins, set up the classroom as a conducive learning environment by:
 - Ensuring the library/resource centre and computer labs have been booked
 - Having the necessary handouts photocopied and ready for each student
 - Providing any necessary writing utensils for students
2. At the start of the lesson, welcome the students into the classroom.

On the board, draw a circle with the words “Business Management and Leadership” inside or use the technology available in the classroom (e.g., a Document Camera or Smart Board) to project a diagram as shown below.



3. Ask students to suggest the names of organizations, careers, positions and companies that stand out as model business leaders. Students will share a variety of responses,

including Amazon, Jeff Bezos, Pepsi, Nike, Seymour Schulich, Bill Gates, Warren Buffett, and Berkshire Hathaway.

Ask students to record the responses in the space provided on the Business Management and Leadership Mind Map Placemat (Appendix 1.1a).

4. Before leading into the Mind Map below, introduce the students to the “What is Financial Services” video – 0:00 to 2:30: http://clients.phanta.com/18019-TFSA_Aspire-VID/v3/index.html

The video will inform the students about what Financial Services are and will help lead into the various roles needed in organizations. It will also help support student participation in and contribution to the Financial Services Industry Mind Map activity.

5. (Note: This part of the activity can be completed with or without drawing the diagram on the board.)

Inform students that you are now moving onto the Financial Services Industry Mind Map Placemat (Appendix 1.1b).

Ask students to write down as many careers as possible related to the Financial Services industry based on what they saw in the video and what they generally know that intertwine with business management and leadership. Some responses include: CEO, CFO, VP of Operations, CTO, CIO, manager, supervisor.

Encourage students to think outside the box – i.e. there are various careers that tie business management into the Financial Services industry.

6. Showcase the TFI In-Demand Careers website: www.explorefinancialservices.com/in-demand-careers/

Ask students to look at the job titles listed on the Financial Services Industry Mind Map (Appendix 1.1b), and complete the short activity box in the corner of the worksheet, writing down which jobs directly relate to positions in business management and leadership.

In this exercise, students will observe the overlap in roles in the Financial Services and Business Management industries.

Part 2: Action (150 mins class work)

1. Hand out the worksheet titled “TFI Career Matching Tool Exploration Activity” (Appendix 1.2). Inform students that they will be learning about various careers in the Financial Services and Business Management industries.

Instruct students to work through the worksheet, highlighting that they will be completing the Career Matching Tool online and researching one of the careers they are matched with.

2. As students are completing the worksheet, the teacher should float around, inquire, and visually assess the students' knowledge, understanding and research skills.
3. After the students have completed their worksheet, as part of scaffolding and leading students to learn about management styles and work environments, assign them into groups of 4-5 for the next activity. Groups can be formed by counting off numbers (1, 2, 3, 4, 5, etc.), numbering via the attendance sheet, or using the current desk layout for pairing.
4. Inform students that they will be reading about leadership skills, ethics and social responsibility as related to the Business Management industry.

Instruct each group to read their assigned resource and compile findings on the Mind Map Placemat for Resource (Appendix 1.3).

5. After students are completed the Mind Map, instruct the students to form new groups – one member from each current group will join with one member from each of the remaining groups. In this new group, each student will share their findings on their Mind Map Place Mat (Appendix 1.3) with the rest of the group.

NOTE: An alternative to step 5 is to have each group summarize and present their resource in a presentation format (Google Slides or PowerPoint) and have this as a formative assessment. This can be assessed using Appendix 1.5.

6. Instruct students to compile their findings on the Mind Map Placemat for Summary of All Resources (Appendix 1.4).

Group Assignments:

1. Globe and Mail: Employers turn to online therapy programs to boost worker productivity:
www.theglobeandmail.com/business/small-business/talent/article-employers-turn-to-online-therapy-programs-to-boost-worker-productivity/
2. Globe and Mail: No job is too small to develop leadership skills:
www.theglobeandmail.com/report-on-business/careers/leadership-lab/no-job-is-too-small-to-develop-leadership-skills/article38048331/
3. Globe and Mail: Lessons I've learned about leading organizational change:
www.theglobeandmail.com/business/careers/leadership/article-lessons-ive-learned-about-leading-organizational-change/

4. Globe and Mail: How leadership can impact workplace mental health:
www.theglobeandmail.com/business/careers/workplace-award/article-how-leadership-can-impact-workplace-mental-health/
5. Globe and Mail: 'Aha' moment in pitch to Nike took Calgary charitable-giving firm from startup to success:
www.theglobeandmail.com/business/article-aha-moment-in-pitch-to-nike-took-calgary-charitable-giving-firm-from/
6. Harvard Business Review: Why Women Aren't Making It to the Top of Financial Services Firms:
<https://hbr.org/2016/10/why-women-arent-making-it-to-the-top-of-financial-services-firms>
7. Globe and Mail: Three ways to fire up employee passion:
www.theglobeandmail.com/business/careers/leadership/article-three-ways-to-fire-up-employee-passion/

Alternative Resources

- Globe and Mail: Five leadership tips for transforming the insurance industry:
www.theglobeandmail.com/report-on-business/careers/leadership-lab/five-leadership-tips-for-transforming-the-insurance-industry/article38314345/
- Globe and Mail: Why good leaders make grave mistakes – and still thrive:
www.theglobeandmail.com/business/careers/management/article-why-good-leaders-make-grave-mistakes/
- Globe and Mail: Will the transfer of wealth to women take sustainable investing mainstream?:
www.theglobeandmail.com/business/careers/leadership/article-will-the-transfer-of-wealth-to-women-take-sustainable-investing/
- Harvard Business Review: Competing on Social Purpose:
<https://hbr.org/2017/09/competing-on-social-purpose?autocomplete=true>
- Harvard Business Review: 5 Signs Your Organization Might Be Headed for an Ethics Scandal:
<https://hbr.org/2017/12/5-signs-your-organization-might-be-headed-for-an-ethics-scandal>

Part 3: Consolidation (35 mins)

1. After all students/groups have presented, thank the students for participating in the activities designed to help them learn and then apply their knowledge.
2. Provide students with Exit Cards (Appendix 1.6) as a collaborative form to assess the students' understanding and application of knowledge learned. Exit Cards can be used as a diagnostic assessment and as a completion mark for this lesson, as part of the Learning Skills for Ministry reporting.
3. Ask the students to share what they've learned about the Financial Services industry, as well as what they've learned about business leadership ethics and social responsibility.

Prompt students to answer the following:

- Q1 – What were some interesting facts and information that you learned about the Financial Services industry and ethics/social responsibility from the perspective of business leaders and their companies?
- Q2 – What preparation for post-secondary is needed, per the careers that you researched/discussed?
- Q3 – Compared to the start of this unit, has your interest in this field of study increased, stayed the same or decreased?
- Q4 – What are your thoughts and reflections on this activity?

The students' responses will be varied and represent an informal indicator of their knowledge and understanding.

Assessment/Evaluation Techniques

- Formative observation of communication and thinking skills during class discussions
- Formative assessment of written response
- Formative assessment of communication and group-work skills during the Mind Map Placemat activities
- Diagnostic evaluation of Mind Map Placemat activities for each individual's contributions (if working in pairs), using Appendix 1.3 and 1.4
- If applicable, summative evaluation of presentation, using Appendix 1.5

Accommodations

- Assignment timelines can be adjusted to accommodate student needs
- English-Language Learners (ELLs) can develop their own literature glossaries that will span the unit
- Assign English-speaking peer partners to ESL/ELD students
- Provide teacher or peer help in completing the research and development of their presentations
- Some students may require a model or scaffold technique to complete their final assignment, and parts of the assignment may require additional instructions to assist students of different abilities
- Reading materials may be adjusted to address the need for appropriate material for students with reading difficulties
- Provide copies of the definitions and notes to assist students who have difficulty taking notes during discussion or supplementing board notes
- Students will be provided a variety of case study choices and opportunities for expressing their knowledge and ideas

Resources

Internet

- TFI website:
www.explorefinancialservices.com
- TFI Career Matching Tool:
www.explorefinancialservices.com/my-career-matches

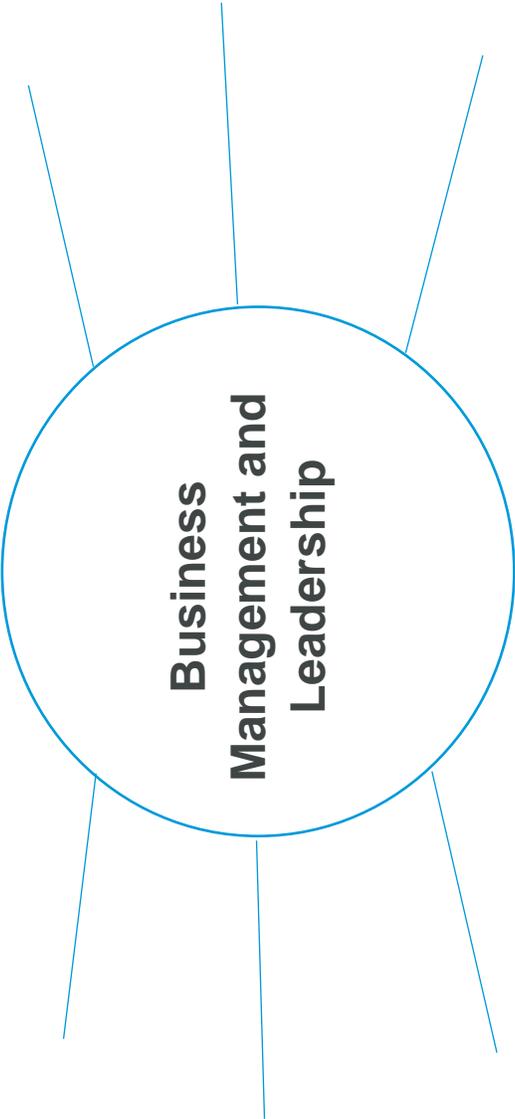
Note: The URLs for websites were verified prior to publication. However, given the frequency with which these tend to change, teachers should verify websites before assigning them for student use.

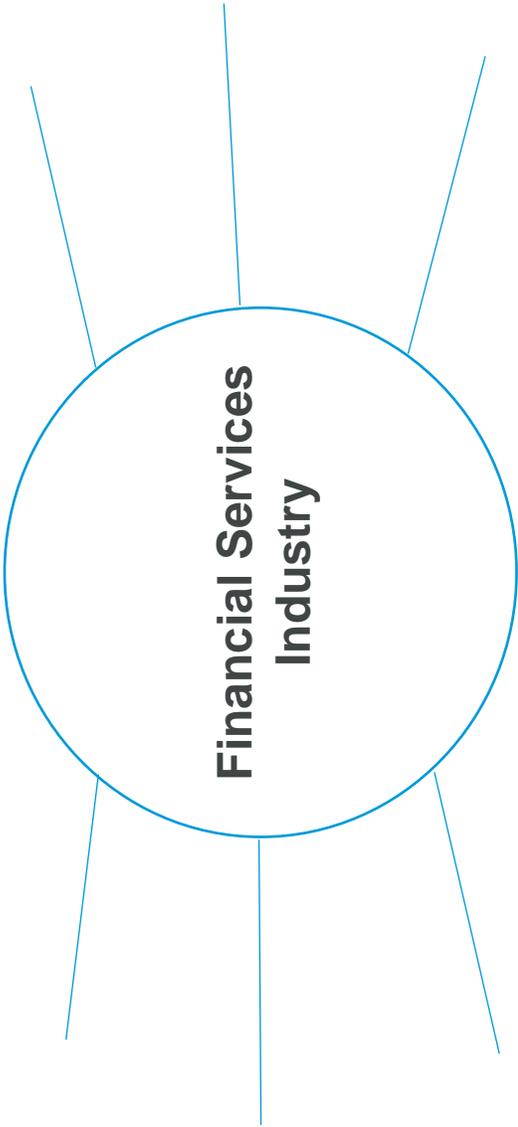
Appendices

- Appendix 1.1a: Business Management and Leadership Mind Map Placemat
- Appendix 1.1b: Financial Services Industry Mind Map Placemat
- Appendix 1.2: TFI Career Matching Tool Exploration Activity
- Appendix 1.3: Mind Map Placemat for Resource

Appendices cont'd...

- Appendix 1.4: Mind Map Placemat Summary for All Resources
- Appendix 1.5: Presentation – Rubric
- Appendix 1.6: Exit Card





Positions that relate to Business Management and Leadership

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Date: _____

Teacher: _____

Name: _____

Completion Mark: /1

What is TFI?

Purpose/mandate:

What services does it provide?

Visit the TFI website: www.explorefinancialservices.com

Complete the TFI Career Matching Tool: www.explorefinancialservices.com/my-career-matches/

Below, compile a list of 5-7 careers that you were matched with based on your responses to the Career Matching Tool.

Career/Job Title	Brief Description

Which two careers are the most interesting to you? Why?

1. _____:

2. _____:

Select one (1) of the careers and complete the following by conducting research on the TFI website:

Career:

Key Role Dimensions:

Focus Areas:

Education, Skills, Experience:

Education Credentials:

Program Offered:

Related Roles:

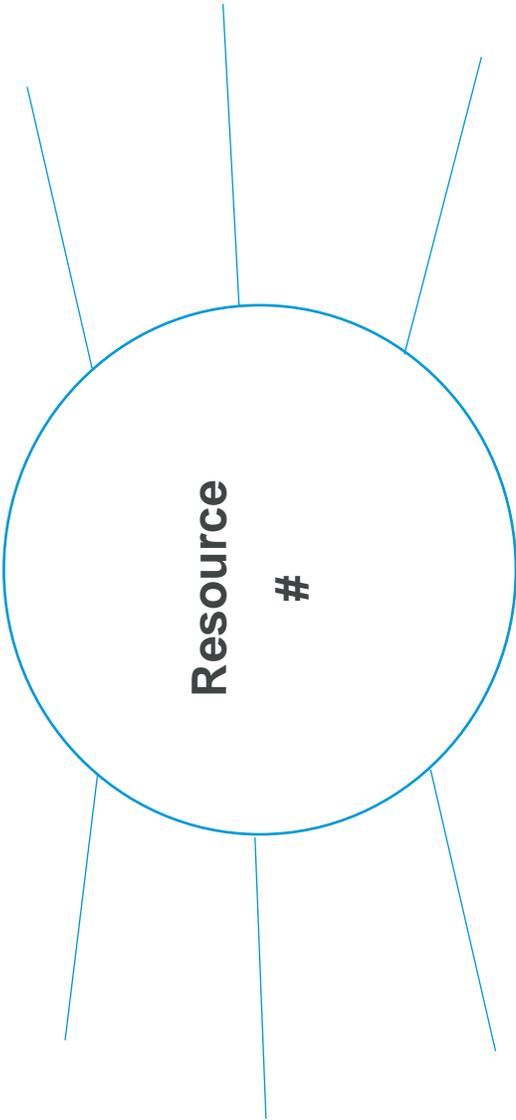
Future Trends and Impacts:

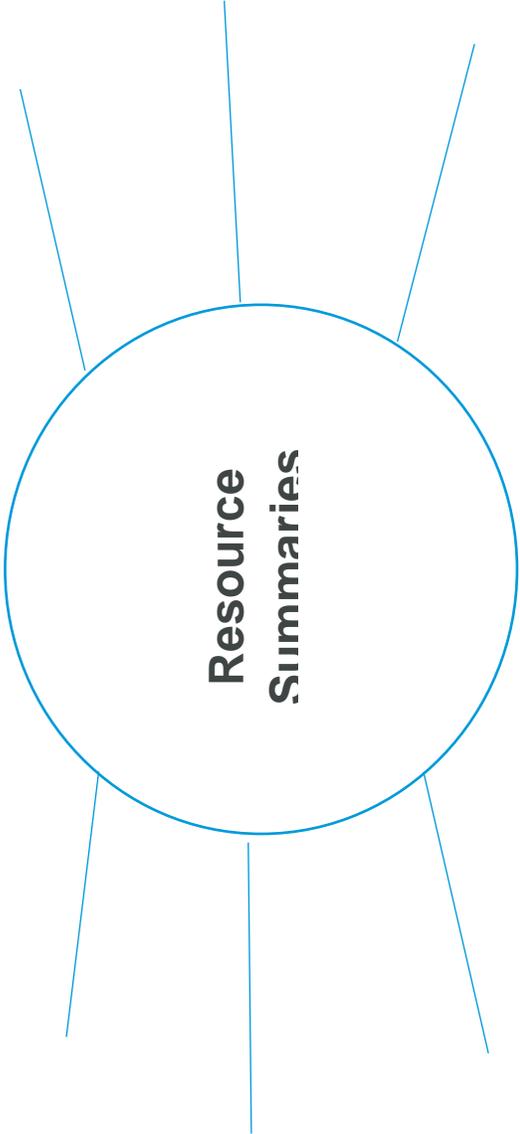
Visit www.explorefinancialservices.com/education/

Based on the education and pathways for the career you've chosen, explore the respective post-secondary institution and look for the requirements for entry into that respective program.

Post-Secondary Institution: _____

Grade 12 Requirements (marks, courses, any other expectations):





Category	Level 1	Level 2	Level 3	Level 4
Knowledge and Understanding				
demonstrate an understanding of management concepts and theories discussed in relation to current business issues in a variety of sources	demonstrates a limited understanding of management concepts and theories discussed in relation to current business issues in a variety of sources	demonstrates a sufficient understanding of management concepts and theories discussed in relation to current business issues in a variety of sources	demonstrates a considerable understanding of management concepts and theories discussed in relation to current business issues in a variety of sources	demonstrates an exceptional understanding of management concepts and theories discussed in relation to current business issues in a variety of sources
Thinking				
evaluate the impact of issues related to ethics and social responsibility on the management of organizations	evaluates the impact of issues related to ethics and social responsibility on the management of organizations, with assistance	satisfactorily evaluates the impact of issues related to ethics and social responsibility on the management of organizations	competently evaluates the impact of issues related to ethics and social responsibility on the management of organizations	expertly evaluates the impact of issues related to ethics and social responsibility on the management of organizations
Communication				
demonstrate the effective use of information and communication technology for a variety of management purposes	demonstrates the effective use of information and communication technology for a variety of management purposes, with assistance	adequately demonstrates the effective use of information and communication technology for a variety of management purposes	competently demonstrates the effective use of information and communication technology for a variety of management purposes	expertly demonstrates the effective use of information and communication technology for a variety of management purposes
demonstrate appropriate techniques for making group and individual presentations	rarely demonstrates appropriate techniques for making group and individual presentations	sometimes demonstrates appropriate techniques for making group and individual presentations	usually demonstrates appropriate techniques for making group and individual presentations	always or almost always demonstrates appropriate techniques for making group and individual presentations
Application				
demonstrate the use of appropriate communication techniques related to business management	rarely demonstrates the use of appropriate communication techniques related to business management	sometimes demonstrates the use of appropriate communication techniques related to business management	usually demonstrates the use of appropriate communication techniques related to business management	always or almost always demonstrates the use of appropriate communication techniques related to business management
use proper business vocabulary in oral and written communication	is beginning to use proper business vocabulary in oral and written communication	satisfactorily uses proper business vocabulary in oral and written communication	skilfully uses proper business vocabulary in oral and written communication	masterfully uses proper business vocabulary in oral and written communication

