

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.

BTT101: Introduction to Information Technology

**LESSON: Fields of Study, Financial Services Industry,
and Careers**

DURATION: 4 periods x 75 minutes

LESSON: Fields of Study, Financial Services Industry and Careers

Time Required: 300 minutes (4 periods x 75 minutes)

Description

This activity allows students to learn about current career trends in the Financial Services industry. Students will learn about the wide range of careers using a Career Matching Tool to help identify pathways and areas of interest connected to the Information Technology industry.

This activity also allows students to collaborate using digital literacy tools and techniques to learn more about the Financial Services industry.

As the students assess and evaluate their areas of interest, they will research various careers and present a comprehensive profile of one career to the class.

Strands and Expectations

Strands

- Electronic research
- Evaluate websites for usefulness, accuracy and validity of research information

Overall Expectations

By the end of this course, students will:

- Apply effective techniques when conducting electronic research
- Use presentation software to create and deliver an effective presentation

Specific Expectations

By the end of this course, students will:

- Identify the types of electronic tools that can be used for research
- Evaluate websites for usefulness, accuracy, validity, bias, appropriateness, and currency
- Use an accepted citation format (e.g., MLA, APA) to acknowledge electronic sources (e.g., websites, online magazines, articles, personal email messages)
- Identify guidelines for designing an effective electronic presentation (e.g., colour schemes, font size, slide content)

Specific Expectations cont'd...

- Create an electronic presentation for a specific purpose and audience
- Use software features (e.g., slide transitions, slide layouts, design templates, animation, sound) to enhance their presentation
- Use effective presentation skills when delivering an electronic presentation (e.g., plan for room dynamics, verbally emphasize important points and support them with screen images)

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 1.1: Mind Map Placemat
 - Appendix 1.2: TFI Career Matching Tool Exploration Activity
 - Appendix 1.3: Presentation – Rubric
- Prepare Padlet or Exit Cards (Appendix 1.4)

Prior Knowledge Required

- Students need to have general knowledge of business, information technology 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 PowerPoint and how to conduct research on the Internet, including the use of a browser

Teaching and Learning Strategies

The following teaching and learning strategies comprise this lesson plan:

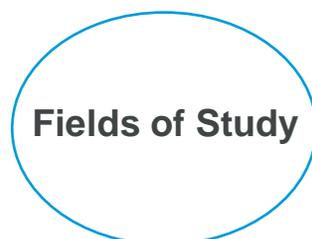
- Part 1: Minds On
- Part 2: Action
- Part 3: Consolidation

Part 1: Minds On (30 mins)

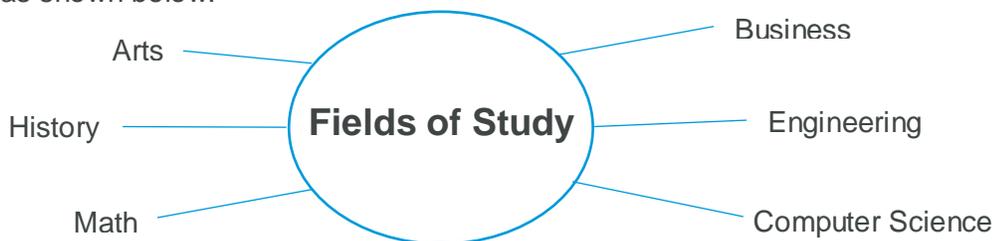
1. Before the lesson begins, set up the classroom as a conducive learning environment by:
 - Ensuring the library/resource centre and computer labs have been booked
 - Having the necessary handouts photocopied and ready for each student
 - Providing any necessary writing utensils for students

2. At the start of the lesson, welcome the students into the classroom.

On the board, draw a circle with the words “Fields of Study” 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 come to the board and write a field of study using a line attached to the circle, as shown below.



Reflect and comment on the strong effort and positive start to the lesson.

4. Introduce students to the “What is Financial Services?” video – 0:00 to 3:00 mark:
http://clients.phanta.com/18019-TFSA_Aspire-VID/v3/index.html

This video will inform students about what Financial Services are and help support their participation in and contribution to the Financial Services Industry Mind Map Placemat activity.

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

Draw another circle on the board with the words “Financial Services” inside.

Ask students to come to the board and write as many careers they can think of that are related to the Financial Services industry, as shown below. Suggestions include: accountant, human resources, lawyer, engineer, or customer service representative, data analyst, programmer, etc.



6. Ask students to compare both diagrams and observe that the various fields of study are connected by careers in the Financial Services industry. This will lead into the activity and learning more about the Financial Services industry and its careers.
7. Ask students to rate their interest level in each field listed on the board (e.g., math, sciences) from 1 to 10, with 1 representing a low interest and 10 representing a high interest. Inform students that they will be sharing their interest levels after the activity as well.
8. Inform students that they will now be learning about the Financial Services industry and its impacts on information technology.

Resume the “What is Financial Services?” video at the section listed below, to showcase the depth and inclusion of technology in the Financial Services industry: “Data Protection, Cyber Security, and Social Finance” - 10:16 to 15:30 mark:

http://clients.phanta.com/18019-TFSA_Aspire-VID/v3/index.html

9. Assign students into groups of 4 or 5, depending on the class size and classroom set up, using a numbering method (1, 2, 3, 4, 5, etc.). If there are 28 students, create groups of four; if 35 students, create groups of five.
10. Assign one of the resources below to each group and instruct the students to complete the Mind Map Placemat worksheet (Appendix 1.1) through a Think Pair Share format.

These resource are rich in detail and provide students with an enriched digital literacy resource to form a solid foundation in understanding the Financial Services industry in Ontario and Canada.

Give students 15 minutes to work in their groups on their assigned resource. After the allocated time has completed, bring the class together and ask each group to share their collaborative reading and research findings.

During the group sharing, provide positive constructive feedback to ensure a fair and respectful learning environment conducive to learning and equity.

Resources:

1. Key Trends - Unlocking the Human Opportunity: Future-proof skills to move financial services forward (Pages 8-9):
https://cdn2.hubspot.net/hubfs/4372260/Talent/TFSA_PwC_Unlocking_human_opportunity_Future-proof_skills_2018_FF.pdf
2. Innovative technologies are reshaping financial services - Unlocking the Human Opportunity: Future-proof skills to move financial services forward (Pages 10-11):
https://cdn2.hubspot.net/hubfs/4372260/Talent/TFSA_PwC_Unlocking_human_opportunity_Future-proof_skills_2018_FF.pdf
3. Skills to Future Proof your Talent - Unlocking the Human Opportunity: Future-proof skills to move financial services forward (Pages 14-15):
https://cdn2.hubspot.net/hubfs/4372260/Talent/TFSA_PwC_Unlocking_human_opportunity_Future-proof_skills_2018_FF.pdf
4. New Roles are Emerging - Unlocking the Human Opportunity: Future-proof skills to move financial services forward (Pages 16-17):
https://cdn2.hubspot.net/hubfs/4372260/Talent/TFSA_PwC_Unlocking_human_opportunity_Future-proof_skills_2018_FF.pdf
5. Impacts Across Business Areas (Technology) - Unlocking the Human Opportunity: Future-proof skills to move financial services forward (Pages 22-23):
https://cdn2.hubspot.net/hubfs/4372260/Talent/TFSA_PwC_Unlocking_human_opportunity_Future-proof_skills_2018_FF.pdf
6. New Skills Trends for Financial Services (Infographic):
www.explorefinancialservices.com/infographics/

Resources cont'd...

7. Canada's Cybersecurity Talent Challenge - The Changing faces of Cybersecurity (Pages 9-11):

<https://cdn2.hubspot.net/hubfs/4372260/Cyber/TFSA%20Deloitte%20Cyber%20Talent%20Report%20July%202018%20web%20vF.pdf>

8. Conference Board of Canada - Financial Services Sector a Source of Capital and Growth for Canada's Economy:

www.conferenceboard.ca/press/newsrelease/16-11-24/Financial_Services_Sector_a_Source_of_Capital_and_Growth_for_Canada_s_Economy.aspx?

Part 2: Action (150 mins class work + 75 mins presentations)

1. After discussing the Financial Services industry as a class, hand out the worksheet titled "TFI Career Matching Tool Exploration Activity" (Appendix 1.2).

Instruct students to work through the worksheet, highlighting that they will be completing the Career Matching Tool online.

2. As students are completing the worksheet, the teacher should float around, inquire, and visually assess the students' knowledge, understanding and research skills.
3. Instruct students to create a simple presentation using Google Slides or PowerPoint, detailing the information they just researched via the worksheet and supplementing with any other information required via Google.

Instruct students to include the following as part of their presentation:

- Introduce themselves
- Which two careers they chose and why
- For their selected career, provide the following:
 - Key Role Dimensions
 - Focus Areas
 - Education, Skills, Experience
 - Education Credentials
 - Programs Offered
 - Related Roles
 - Future Trends and Impacts

- Which post-secondary institution they would attend for this program, including grade/course requirements
 - Next Steps: How they plan to prepare for this pathway and career
4. Instruct each student to present their findings to the class, leaving time for a Q&A. Plan for class presentations to take 75 minutes.
 5. Assessment:
 - The Career Matching Tool can be assessed as a completion mark or diagnostic assessment based on the curriculum expectations
 - Appendix 1.3 Presentation – Rubric can be used to assess each student's presentation

Part 3: Consolidation (45 mins)

1. Before the lesson begins, visit www.Padlet.com and create a teacher account, if you do not already have one. Padlet enables teachers to post questions and invite students to post their responses, which are then available to the whole class to see.

You can use Padlet as a means to assess the students' understanding and application of knowledge learned during the lesson. Padlet can be used as a diagnostic assessment and as a completion mark for this lesson.

2. Input the following questions into the Padlet wall:
 - Q1 – Which career/job did you select?
 - Q2 – Based on your career, what skills would you need to acquire prior to starting?
 - 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?

As an alternative to Padlet, teachers can use Exit Cards (Appendix 1.4) to assess the students' understanding and application of knowledge learned during the lesson. Exit Cards can be used as a diagnostic assessment and as a completion mark for this lesson.

1. Provide students with Exit Cards, prompting them answer the following questions:
 - Q1 – Which career/job did you select?
 - Q2 – Based on your career, what skills would you need to acquire prior to starting?

- Q3 – Compared to the start of this unit, has your interest in this field of study increased, stayed the same or decreased? (Instruct students to refer to their ratings captured on Appendix 1.1.)
- Q4 – What are your thoughts and reflections on this activity?

Regardless of how the students' reflections are captured, their responses will be related to the careers, education and skills related to the TFI website. Some students may share their interest in various careers they did not know existed prior to this lesson.

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 Minds On assignment
- Summative evaluation of presentation, using Appendix 1.3

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

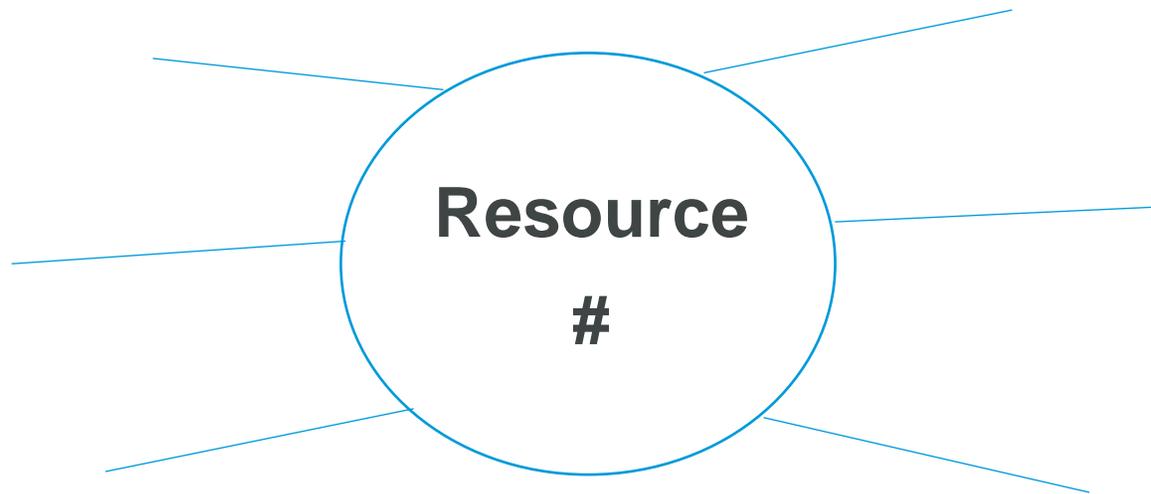
Internet

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<https://cdn2.hubspot.net/hubfs/4372260/Cyber/TFSA%20Deloitte%20Cyber%20Talent%20Report%20July%202018%20web%20vF.pdf>
8. Conference Board of Canada - Financial Services Sector a Source of Capital and Growth for Canada's Economy:
www.conferenceboard.ca/press/newsrelease/16-11-24/Financial_Services_Sector_a_Source_of_Capital_and_Growth_for_Canada_s_Economy.aspx?AspxAutoDetectCookieSupport=1

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 1.1: Mind Map Placemat
- Appendix 1.2: TFI Career Matching Tool Exploration Activity
- Appendix 1.3: Presentation – Rubric
- Appendix 1.4: Exit Card



Career/Job Title	Interest Level Before (1 = low, 10 = high)	Interest Level After (1= low, 10 = high)

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):

Next Steps: As a Grade 9 student, what steps could you take this year, to prepare for the career you've chosen?

Category	Level 1	Level 2	Level 3	Level 4
Knowledge and Understanding				
summarize information gathered	summarizes information gathered using limited organization	summarizes information gathered using some organization	summarizes information gathered using considerable organization	summarizes information gathered using thorough organization
summarize research material	summarizes research material with limited clarity	summarizes research material with some clarity	summarizes research material with considerable clarity	summarizes research material with a high degree of clarity
Thinking				
analyze their understanding of their chosen career	analyzes their understanding with limited results	analyzes their understanding with some results	analyzes their understanding with good results	analyzes their understanding with excellent results
analyze the characteristics of their chosen career	analyzes the characteristics with assistance	analyzes the characteristics with some capability	analyzes the characteristics capably	analyzes the characteristics with expertise
Communication				
explain concept clearly	explains concept with limited clarity	explains concept with some clarity	explains concept with considerable clarity	explains concept with a high level of clarity
describe concept in an organized manner	description of concept demonstrates limited organization	description of concept demonstrates some organization	description of concept demonstrates considerable organization	description of concept demonstrates a high level of organization
Application				
evaluate information using supporting factual details	evaluates information using few supporting factual details	evaluates information using some supporting factual details	evaluates information using many supporting factual details	evaluates information using a wide range of supporting factual details

