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| **Project Overview** | | | | | | | | | | |
| **Name of Project: Money Management: Making Taxes Easy** | | | **Duration (days): 6 days (or more if students actually complete their taxes in class)** | | | **Written For:**  Period Schedule  Block Schedule | | | Trimester  Semester | |
| **Subject/Course: JAG** | | | **Teacher(s): R. Leinaar** | **State: Iowa** | | **Grade Level(s):**  7/8  9/10 | 11/12  Alternative Ed.  Out of school | | | Any |
| **Other Subject Areas to Be Included: Accounting, Business, Economics** | | | | | | | | | | |
| **Project Summary**  What will the students be doing? What challenges will they face? What is the purpose? | Students will learn how to fill out a W4 form and how to read their W2 and file their own taxes.  They will also learn about different areas in the community that will file their taxes for them.  Once the students become an expert, they will create an informational quick reference guide to share with all the students. This will include what they need to complete their taxes and a list of places in the community where they can get there taxes done. | | | | | | | | | |
| **Driving Question**  What problems/questions will students be learning about? | How in the world do I file my taxes? | | | | | | | | | |
| **Entry Event**  How will you introduce the topic in an engaging way? | Invite a guest speaker from a local accounting firm or tax preparation center to speak to the students about how the steps to filing their taxes. | | | | | | | | | |
| **Public Product**  How will students be able to demonstrate what they have learned? | **Team:** | Quick Reference Guide to taxes | | | How will students demonstrate competency attainment as a team? | | | **Presentation Audience** | | |
| Class | | |
| School | | |
| Community | | |
| **Individual:** | Generate questions they have about taxes, prepare individual taxes (if pertains to your classroom) | | | How will students demonstrate competency attainment individually? | | | Experts | | |
| Web | | |
| Other:Click here to enter text. | | |

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| **Project Overview** | | | | | | | | | | | | |
| **Competency Attainment**  What competencies should students understand, know and be able to do as a result of the PBL? | | | What competencies will you introduce? **(Level 1):**  **C18**  What competencies will be in progress during this project? **(Level 2):**  **D21,D22**  Which competencies will students be able to demonstrate mastery by the end of this project? **(Level 3):**  D23,D24,E26, H74 | | | | | | | | | |
| **Formative Assessments**  (Check all that apply)  How will you assess student learning throughout the PBL? | | | Checklists | | | Notes | | | | | | Preliminary  Plans/Outlines/Prototypes |
| Concept Maps | | | Online Tests/Exams | | | | | | Quizzes/Tests |
| Journal/Learning Log | | | Practice Presentation | | | | | | Rough Drafts |
| Other (see PBL Library for ideas): Click here to enter text. | | | | | | | | | |
| **Summative Assessments**  (Check all that apply)  How will you assess student learning at the completion of the project? | | | Essay | | | | Peer Evaluation | | | | |  |
| Multiple Choice/Short Answer  Test | | | | Self-Evaluation | | | | |  |
| Oral Presentation, with rubric | | | | Written Final, with rubric | | | | |  |
| Other (see PBL Library for ideas): Quick reference guide to taxes checklist | | | | | | | | | |
| **Reflection Methods**  How will you provide intentional opportunities for students to reflect on learning throughout the PBL? | | | **(Individual, Group, and/or Whole Class)** | Journal/Learning Log | | | | | | Focus Group – Success Counsel | | |
| Whole-Class Discussion | | | | | | Fishbowl Discussion | | |
| Survey | | | | | | Other (see PBL Library for ideas): Click here to enter text. | | |
| **Project Overview** | | | | | | | | | | | | |
| **Career Association:**  How will you build student leadership into the PBL? | | | **Which CA Goal(s) will be covered in this PBL?**  Leadership  Community Service  Career Prep  Civic Awareness  Social Awareness  Fundraising | | **What roles will your officers lead in planning?**  Leadership: Click here to enter text.  Community Service: Click here to enter text.  Career Prep: Click here to enter text.  Civic Awareness: Click here to enter text.  Social Awareness: Through this PBL students will learn how to do their taxes.  Fundraising: Click here to enter text. | | | | | | | |
| **How will you incorporate committees, or the rest of your class?**  Leadership: Click here to enter text.  Community Service: Click here to enter text.  Career Prep: Click here to enter text.  Civic Awareness: Click here to enter text.  Social Awareness: Click here to enter text.  Fundraising: Click here to enter text. | | | | | | | |
| **Which Career Pathways will be incorporated into this PBL?**  Arts & Communication  Business, Management, Marketing & Technology  Engineering/Manufacturing & Industrial Technology  Health Sciences  Human Services  Natural Resources & AgroSciences | | | | | **Which employers/businesses will you work with throughout this project?**  Accountant, Tax Expert(s) | | | | | | | |
| **Employer Engagement Strategy:**  How will you utilize employer connections to increase relevance? | | | **Circle One:**  Meet and Greet  Classroom Presentation  Project Observation  Skype/Webinar  Mock Interview  Other: Click here to enter text. | | **Circle Two:**  Service Learning  Company Tour  Mentoring  Co-Develop PBL/Scaffolding  Critique of Public Product  Other: | | | | | | **Circle 3:**  Job Shadow  Limited Time Work Experience  Pre-Apprenticeship  Internship/Apprenticeship  Summer Job  Other: Click here to enter text. | |
| **Project Overview** | | | | | | | | | | | | | |
| **Scaffolding**  What lessons, exercises, and activities will be integrated into the project that build a student’s understanding and experience with the content?  How is this scaffolding be leading students towards the Driving Question and ultimately to a high-quality Public Project? | | | **Prior to the Project Beginning:**  (What do you need to do to prepare for the project to begin?)   * Build relationships with community members, organizations or tax preparation centers who would be willing to share their expertise on filing taxes. * Secure materials needed   **Launching the Project:**  (How will you SPARK their attention?)   * Perform the entry event (See day 1 of calendar) * Share the driving question * Discussion on student voice and choice...What do they want to know? What is some information they already have, but are not sure if information in accurate? (Truths & Myths), What employer would they like to contact to come speak?, How would they like to design their FAQ for the speaker?   **Project Navigation:**  (What are the main ideas and lessons you will need to take from the first day, through completion of the PBL?)  Click here to enter text. | | | | | | | | | | |
| **Accommodations**  What modifications will you need to make to fit the needs of all students in your classroom? | | | Adjustments may be made based on 504 or IEP accommodations | | | | **Revision & Critique:**  How will you provide opportunities for students to review their work and provide feedback for improvement? | A variety of accommodations can be made to meet students’ individual needs. | | | | | |
| **Resources**  How will you incorporate business professionals, employers, community leaders, organizations, technology, funding and other resources to implement this project? | | | **WHO** will you be incorporating? | | | | **HOW** will you be incorporating? (please describe) | | | | | | |
| School Staff | | | | School-Based Individuals: Business, Economic, and Accounting Teachers | | | | | | |
| Business Professionals/Employers | | | | Click here to enter text. | | | | | | |
| Community Leaders/Organizations | | | | Accountant, Tax Expert(s) | | | | | | |
| Technology | | | | Computer, printer, tax software program, access to a printer | | | | | | |
| Materials | | | | Cardstock, paper cutter | | | | | | |
| **student Learning Guide** | | | | | | | | | | | | |
| **Project: : Money Management: Making Taxes Easy** | | | | | | | | | | | | |
| **Driving Question:** How in the world do I file my taxes? | | | | | | | | | | | | |
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| **Description of Activity/Product**  What will students, specialists, guests, etc. be doing during this portion? | | | | | | | | **Learning Outcomes/Targets**  What knowledge, understanding & success skills will students need to successfully complete this portion? | | | | |
| Formative  Final Product | Click here to enter text. | | | | | | | Click here to enter text. | | | | |
| Team  Individual |
| Formative  Final Product | Click here to enter text. | | | | | | | Click here to enter text. | | | | |
| Team  Individual |
| Formative  Final Product | Click here to enter text. | | | | | | | Click here to enter text. | | | | |
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| Team  Individual |

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| **PROJECT CALENDAR** | | | | |
| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
| **PROJECT WEEK ONE** | | | | |
| Entry event (can find similar videos on taxes and paycheck)  Video on reading a pay stub and taxes  <https://www.youtube.com/watch?v=RnxGhlX8PVY>  <https://www.youtube.com/watch?v=ujdN7uK5kDk>  <https://www.youtube.com/watch?v=oKLtwk_Jh6o>  Students generate questions they have about taxes that they will ask the guest speaker. | AT&T/ Nepris  Guest speaker- Accountant   * How to file taxes. * What is a 1040EZ * Important information needed to file * Clarify myths and facts | Students work on their Quick Reference Guide to Taxes | Students work on their Quick Reference Guide to Taxes and ensure they have all the components of the checklist.  See checklist | Students complete/revise their Quick Reference Guide (Public Product) and distribute them during lunch in the cafeteria.  Several JAG Members could set up a table in the lunchroom to be available to answer questions.  Make copies of the Taxes Quick Reference Guide on colored cardstock paper prior to distribution. |
| **PROJECT WEEK TWO** | | | | |
| **Class Discussion/Reflection:**  What were student’s reactions/comments in the cafeteria. Should we make changes for next year? Etc.  Is there a need to provide an even better service to students/families/the community around submitting taxes in the future? What might we do? How could we help? | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |

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| **PROJECT CALENDAR** | | | | |
| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
| **PROJECT WEEK THREE** | | | | |
| Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| **PROJECT WEEK FOUR** | | | | |
| Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |

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| **PROJECT CALENDAR** | | | | |
| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
| **PROJECT WEEK FIVE** | | | | |
| Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| **PROJECT WEEK SIX** | | | | |
| Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |

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| **ADDITIONAL INFORMATION** |
| Another direction you could take this project is to have your students prepare their taxes on their own. Your community expert could walk them through the process (H&R Block, for example) could provide the tax software and could lead the process with your students. An alternative public product could be for the JAG Students to offer a Tax Completion workshop for students in the school to attend, with the collaboration of Tax Experts on hand, could walk their classmates (and/or parents, friends, public) through the tax submission process. It would be a service provided to your community! |