

Tentative Syllabus

Financial Basics for Communicators James K. Gentry, Ph.D. Clyde M. Reed Teaching Professor Journalism 616

jgentry@ku.edu

Spring 2016

785-218-4755

Jan. 19	Review of syllabus Business environment today
Jan. 26	Markets Markets
Feb. 2	Markets Buying stock; Markets
Feb. 9	Markets Markets; SEC filings
Feb. 16	<i>Paper discussion: Our rapidly changing world;</i> Markets quiz review
Feb. 23	<i>Markets quiz;</i> Overview of accounting Income Statement
Mar. 1	Income Statement Income Statement
Mar. 8	<i>Spring Break</i> <i>Spring Break</i>
Mar. 14	Balance Sheet Three company case: CVS, Walgreen and Rite Aid
Mar. 22	Balance Sheet Common Size Analysis
Mar. 29	Crocs: Looking at EBITDA, goodwill and impairment Statement of Cash Flows
Apr. 5	Comparing Four Investment Opportunities Budgets and budgeting
Apr. 12	Budgets and Budgeting Review for financial statements exam

Apr. 19	<i>Financial statements exam</i> Big data
Apr. 26	Personal finance Personal finance
May 3	Personal finance Personal finance
May 5	<i>STOP DAY</i>

Required reading

Business media such as The Wall Street Journal and New York Times, print or online, Seeking Alpha, Quartz, Business Insider, etc . My Journal password is “jkgentry” and “04gentry.”

Recommended

For terminology, the best online source is www.investopedia.com. In print, “Dictionary of Finance and Investment Terms” by Downes and Goodman or a similar reference.

Objectives of the Course

This course will give you the ability to:

- Understand how a company operates as a business.
- Understand important issues in the international economy.
- Find and understand important SEC documents and other important sources of information on public companies.
- Understand a public company’s financial statements.
- Compare public companies’ financial statements.
- Analyze and draw informed conclusions about a public company’s financial condition.
- Make informed decisions about key personal finance issues

Determinants of Course Grade

Sort of weekly reports	15%
Regular Facebook group	15%
Paper	15%
Markets quiz	15%
Financial statements exam	25%
Class participation	15%

Components of Course Grade

Sort of weekly reports. You will pick a public company to follow for much of the semester. You will prepare regular reports on that company over part of the semester. Your first report will be due to me next week. I will give you the subject and deadline for each week’s report.

Your first report should be what the company says about itself. Possible sources: Annual report, 10-K, press releases, etc. You should write a minimum of 650 words. I will give you the format for the report.

Other likely reports could be:

What the business press says about the company.

What analysts and “experts” say about the company.

At least four key findings in the company’s 10-K.

A recent SEC filing and what it means for the company.

How does your company use social media? Specifically, for media relations, does it use Facebook, Twitter, blogs, etc.? For investor relations, does it use Facebook, Twitter, blogs, etc.?

Regular Facebook group. You will post regularly to the class Facebook group. Dates for posting and comments will be determined.

Paper. You will write a paper on an important issue facing the U.S. or the globe. I will provide a list of topics from which to choose. Format and length will be forthcoming.

Markets quiz. We’ll study risk, markets and other basic concepts for the first weeks of the course. We’ll also learn about important people in business. This quiz will cover that material.

Financial statements exam. You will analyze two companies’ financial statements and answer a series of questions. I will review possible exam material in detail before we have the exam.

Class participation. Although I will be doing a lot of talking, ideally we should have a great deal of interaction. You should be engaged in discussions. You can’t make an A in this course if you don’t participate.

Office Hours

I will have office hours at 1:00 to 3:30 on Tuesday and Thursday. If you want to meet to discuss anything regarding the class, or just visit, come by or make an appointment. I’m also available by text (785-218-4755) or email (jgentry@ku.edu) just about any time.

Class Attendance

Since this class meets twice a week, missing a class means you are missing a lot of information. You should make every effort to attend class. If you have an emergency or crisis that affects your class performance, let me know immediately. Poor class attendance negatively affects your “class participation” grade.

“Old School” Guidelines

You should conduct yourself in a professional manner in class. Among other things, during class:

- You should have your cell phones off or muted
- You should not be on your computer

- You should not be texting, Tweeting or checking Facebook
- You should not be chatting with fellow students
- You should not get up and wander out of class when the whim strikes you
- You should not be smacking or popping gum or otherwise disrupting the class

Professional conduct factors heavily into your “class participation” grade.

School of Journalism Policies

Classroom Attendance

No student may add a journalism class after the 20th day of a semester.

Students must attend their classes and laboratory periods. Instructors may take attendance into account in assessing a student's performance and may require a certain level of attendance for passing a course. Instructors may choose to drop students from a course, based on attendance, without consent.

The School of Journalism reserves the right to cancel the enrollment of students who fail to attend the first class or laboratory meeting.

The KU Office of Student Financial Aid is required by federal law to determine whether students who receive aid are attending each class in which they are enrolled. Instructors are required to report to that office absences of students who have stopped attending and names of those who have enrolled but never have attended. Students who do not attend classes may be required to repay federal and/or state financial aid.

Students who receive any form of financial aid should learn all requirements including minimum hours of enrollment and grades to qualify for and retain that aid.

Students with Disabilities

The University of Kansas is committed to helping all students learn. If you have a special need that may affect your learning, please contact me as soon as possible. Please be aware that the KU Office of Disability Resources coordinates accommodations and services for all students who are eligible. If you have a disability for which you wish to request accommodations and have not contacted this office, please do so as soon as possible. Information about services can be found at <http://www.disability.ku.edu/~disability/>. Or visit the office on the first floor of Strong Hall. Phone numbers: 785-864-2620. Please contact me privately regarding your needs in this course.

Copying or Recording

Course materials prepared by the instructor, as well as content of all lectures presented by the instructor, are the instructor's property. Video and audio recording of lectures without instructor consent is prohibited. On request, the instructor usually will permit students to audio tape lectures, on the condition that these audio tapes are only used as a study aid by the

individual making the recording. Unless the instructor gives explicit permission, recordings of lectures may not be modified and must not be transferred or transmitted to any other person, whether or not that individual is enrolled in the course.

Plagiarism and Fabrication/Falsification

The William Allen White School of Journalism and Mass Communications does not tolerate plagiarism, fabrication of evidence and falsification of evidence.

In this class, and in all journalism classes, honesty and integrity are critical. Any work you do must be original and reflect your own ideas, thoughts and research. In a work setting, if you choose to violate professional standards, you will be fired. In this course, the penalty for plagiarism, fabrication or falsification is a failing grade for the semester. Additional penalties can include expulsion from the School of Journalism. If you have questions about what constitutes plagiarism, fabrication or falsification, please consult the professor of this course.

The KU University Senate defines plagiarism as “knowingly presenting the work of another as one’s own (i.e., without proper acknowledgment of the source). The sole exception to the requirement of acknowledging sources is when the information or ideas are common knowledge.” The University defines fabrication and falsification as “unauthorized alteration or invention of any information or citation in an academic exercise.”

Here’s some clarification:

- If you use or attempt to use any unauthorized materials during a test, or if you give any unauthorized materials to someone else during a test, this is cheating. Unauthorized materials include written materials, such as notes. Unauthorized materials include any forms of nonverbal communication (one cough, answer is A; two coughs, answer is B).
- Plagiarism is stealing. You take someone else’s ideas, thoughts, or words, and you present them as your own original work. This includes taking ideas from written sources, such as books, as well as materials on the Internet. Cutting and pasting materials from the Internet and presenting that work as if it was your own is plagiarism. There may be times when you want to incorporate another person’s ideas, opinions, and words into the papers you write, to make a point or to provide background. If you do, it is essential that you attribute that information—that you explain where the information came from and give credit where credit is due. “Recycling” past interviews or research from previous J101 students and presenting it as your own is plagiarism.
- Fabrication and falsification mean that you made it up. This can include making up an entire interview or embellishing a fact, quote, or statistic to make it sound better. Don’t do it.

Inclement Weather

In the event of inclement weather, KU officials decide whether to cancel classes. To determine whether classes are cancelled, call 864-7669 (864-SNOW). I will also try to keep you advised.