

Tentative Syllabus

Financial Fundamentals for Communicators
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Journalism 616

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Week of

Jan. 21	Review of syllabus; Business environment today
Jan. 28	Markets
Feb. 4	Markets; Dow, S&P 500, NASDAQ
Feb. 11	Markets; buying stock; SEC filings
Feb. 18	Paper discussion: Our rapidly changing world; Overview of accounting
Feb. 25	Accounting; Income Statement
March 4	Income Statement Markets quiz
March 11	SPRING BREAK
March 18	Groundhog Day: Income Statement
March 25	Common Size Analysis; Balance Sheet
April 1	Company case I: CVS, Walgreen, ExpressScripts Balance Sheet and Cash Flows
April 8	Balance Sheet and Cash Flows
April 15	Crocs: Looking at EBITDA, goodwill and impairment; Company case: Your favorite companies
April 22	Financial statements exam
April 29	Personal finance
May 6	Personal finance
May 10	STOP DAY

Required reading

Traditional business media (print or online) such as The Wall Street Journal, New York Times and Bloomberg BusinessWeek, and online media such as Seeking Alpha, Quartz, Business Insider, etc.

Recommended

For terminology, the best online sources are www.investopedia.com and www.motleyfool.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

Regular reports and posts	20%
Paper	15%
Markets quiz	20%
Financial statements exam	30%
Class participation	15%

Components of Course Grade

Regular reports and posts. You will pick a public company to follow for much of the semester. You will prepare regular reports on that company over perhaps half of the semester. I will give you the subject, deadline and format for each week's report. I also will give you a list of companies from which to choose.

For example, your first report will be on what the company says about itself. Possible sources will be annual reports, 10-Ks, press releases, etc. You will write a minimum of 650 words. As a reminder, I will give you the format for the report.

Other possible types of reports:

- What the business press says about the company (at least four sources).
- What analysts and "experts" say about the company (at least four sources).
- At least four key findings in the company's 10-K.
- How does your company use social media?

You will prepare a report on watching business news and might occasionally post to our class Discussion site. Dates for posting and comments will be determined.

Paper. You will write a short 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 some important people in business This short quiz (with an answer pool) 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 active in discussions. You can't make an A if you don't participate.

Office Hours

My "office hours" will be noon to 1:00 on Monday and Wednesday. Since I have no office this semester, we can meet in the Clarkson Center or elsewhere. I also will be available by text (785-218-4755) or email (jgentry@ku.edu) just about any time.

Class Attendance

You should make every effort to attend class. If you have an emergency or crisis that affects your class performance, let me know immediately. Also, if you plan to be out of town, let me know in advance. Several absences will negatively affect your "class participation" grade.

Blackboard Use

I will post all class documents and assignments on our J-616 Blackboard site. All lectures will be presented in Powerpoint format with supplementary readings.

"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 unless I ask you to use it for research
- 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 (including attendance) factors into your "class participation" grade.

School of Journalism Policies

Journalism School Policy on 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.

Financial Aid Policy

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.

Misconduct

Students are bound by the university rules on academic misconduct. If you have any questions about what constitutes cheating, please ask BEFORE your endeavor.

Policy on 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. Penalties for plagiarism, fabrication or falsification can include a failing grade for the course and expulsion from the School of Journalism and Mass Communications. If you have any questions about what constitutes plagiarism, fabrication or falsification, please consult the professor of the course.

The following definitions are from Article II, Section 6, of the University Senate Rules and Regulations, revised FY98.

Plagiarism: Knowingly presenting the work of another as one's own (i.e., without proper acknowledgement of the source). The sole exception to the requirement of acknowledging sources is when the information or ideas are common knowledge.

Fabrication and Falsification: Unauthorized alteration or invention of any information or citation in an academic exercise.

Students with Special Needs

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 record lectures, on the condition that these recordings 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.

Inclement Weather

In the event of inclement weather, KU officials decide whether to cancel classes and generally will send you a text. If you are unsure if classes are cancelled, call 864-7669 (864-SNOW). Since I travel to class from Overland Park, I will also be attuned to the university's plans and I will try to keep you advised.

University Policies

Handguns

Individuals who choose to carry concealed handguns **are solely responsible to do so in a safe and secure manner in strict conformity with state and federal laws and KU weapons policy.**

Safety measures outlined in the KU weapons policy specify that a concealed handgun:

- Must be under the constant control of the carrier.
- Must be out of view, concealed either on the body of the carrier, or backpack, purse, or bag that remains under the carrier's custody and control.
- Must be in a holster that covers the trigger area and secures any external hammer in an un-cocked position
- Must have the safety on and have no round in the chamber.

Tests and Quizzes

Instructors are allowed by Kansas Board of Regents policy to require backpacks, purses and other bags be placed along a side wall during exams and quizzes, and as such those items will not be under the constant control of the individual. Students who choose to carry a concealed handgun in a purse, backpack, or bag must review and plan each day accordingly, and are responsible for making alternate arrangements as necessary. The university does not provide appropriate secured storage for concealed handguns.

Individuals who violate the KU weapons policy may be asked to leave campus with the weapon and may face disciplinary action under the appropriate university code of conduct.

Ambler Rec Center (and other studio or workshop lockers)

The recreation center lockers are not approved secured storage for handguns. Individuals who choose to carry a concealed handgun must plan their day accordingly and transfer their handgun to an approved secure storage device in their vehicle or their residence before arriving for recreational activities.