

FINANCIAL MANAGEMENT 2910
FM Reports

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1. PURPOSE

The purpose of the FM reports is to give the student:

- a. an opportunity to analyze an organization first-hand by visiting that organization, talking to key personnel and seeing the actual production of its product or service.
- b. an opportunity to see how organizations apply the theory learned in the classroom to actual situations.
- c. practice in obtaining information from an organization necessary for the preparation of a report.
- d. practice and experience in analyzing functions of an organization.
- e. practice in operating as a team of consultants analyzing an organization.
- f. an opportunity to make a formal oral presentation before a large group.
- g. experience in designing a formal presentation using audio-visual equipment and techniques.

2. PROCEDURE

- a. Each set will form three groups of between 5 to 8 members. Each group will be called a syndicate.
- b. From each set, one student will be selected to become a member of the overall FM Reports Coordinator Group.
- c. Each group will select an appropriate organization, preferably a business firm, to analyze. This selection should be chosen very carefully, since the choice is crucial to the presentation. The selection should be presented to the Coordinator Group at the earliest possible opportunity, since there is no duplication allowed, and the scheduling will probably be arranged according to the date that the selection was presented to the Coordinator Group. In any case, submission of your organization to the Coordinator Group must be made no later than January 30th.

- d. Once all the organizations have been approved by the Coordinator Group, the scheduled dates of the presentations will be finalized. The resulting schedule is final.
- e. The oral presentations should be between 20 and 30 minutes in duration. Because timing is so important, the presentation must be rehearsed.
- f. The oral presentation should involve *all members* of the group.
- g. An audio-visual presentation should be an integral part of the whole presentation. It should complement, not dominate the presentation.
- h. No formal written report is required, however, groups should retain presentation materials for possible presentation to 1998 Financial Reports students.
- i. Each group should publicize their presentation in order to encourage full attendance.

3. SUPPLIES

It is suggested that a slide show be incorporated into the presentation and therefore the groups will have to purchase 35mm slide films. The total cost of all supplies for this course should not exceed \$20 to \$30 per student.

No supplies will be provided by BCIT.

Slide projectors, tape recorders, movie projectors, etc., may be borrowed from the Audio Visual Department at BCIT. Obtain borrow slips from your coordinator.

The cost of an a/v equipment not returned to the Institute by the student group will be charged to that group.

4. PRESENTATION COVERAGE

The presentation should cover the following areas:

- i. history of the organization.
- ii. organization structure.
- iii. financial background.
- iv. tracing of the product or service from start to finish.
- v. scope and diversity of operations of the organization.
- vi. marketing/advertising handled by the company.

5. MARKS

The marks for the project are 100. These are allocated as follows:

Oral presentation	<u>100</u>
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Breakdown:

a. Use of a/v in presentation	30
b. Coverage of topic:	20
– history	
– organization structure	
– product/service “story”	
– financial aspects	
c. Speech	30
d. Presentation	20

6. ORGANIZATIONS TO BE ANALYZED

It is suggested that the organization to be analyzed be a small- to medium-sized organization, rather than a large and complex one. The size and complexity of a large organization makes it difficult to analyze. You should be very careful about the selection process. If you are turned away by one or two firms, don't let it deter you. A good method for analyzing the firm before you enquire, is to use a grid. On one side put the presentation coverage, history, etc., and on the other side rate these (good, fair, poor). If you do this for several types of firms, you will be able to see in advance some of the difficulties you may encounter.

7. CONTACTING THE ORGANIZATION

Contact a senior member of the organization and ask permission to do the study. Ensure that the organization has not been previously done within the last year. A list of organizations presented last year are as follows:

McDonald's	Mushroom Studios
B.A. Blacktop Mobile Data International	Molson's
Olympic Fitness	Vancouver Canucks
Neon Works	KSFN '97
BC Transit	Canski
Granville Island Brewery	TIR Systems
IKEA	BCAA
BC Lions	

When you have decided on an organization, submit a study proposal to the firm. This is good public relations, and shows that you are well organized.

8. USING AUDIO VISUAL

A person from the A/V department will give a demonstration on A/V equipment use early in January. It is important that you do not make extensive demands on the people in the A/V department. When you need help, be prepared and well organized.

9. COORDINATION GROUP

The Coordination Group consists of one student from each set. The responsibilities are as follows:

- i. to establish a schedule of presentations under the guidance of the instructor responsible for the workshop.
- ii. to approve the organization submitted for approval by each group. No duplication is allowed, i.e., no two groups doing the same organization.
- iii. sign out slips for a/v equipment are to be handed out to the group through the Coordination member.
- iv. These slips will be available from the instructor.
- v. The Coordination Group will work with the instructor in designing an equitable marking scheme. The Coordination Group will mark the presentations in the method they consider fair, under the guidance of the instructor responsible for the Workshop.

During the presentations, each member of the Coordination Group should locate in various parts of the lecture theatre to ensure the presenting groups are similarly effective throughout the entire theatre.

The Coordination Group members should use copies of the FM Reports presentation assessment for assessing the presentations. (See Appendix #2.)

After each presentation, a marks meeting should be held to discuss presentations and determine marks. After all marks are listed by each member, the lowest and highest in each category should be discarded in order to eliminate bias. The remaining marks should be totalled and averaged.

The Coordination Group may find it useful to use a partial mark or decimal system, i.e., 1 ½ (1.5) etc.

An initial mark for each group is to be awarded using the system referred to above. Marks are not to be returned to any group or student, but are to be kept in strict confidence and submitted to the instructor for final adjustments and disposition.

- vi. The Coordination Group is responsible for ensuring that the schedule of presentations is adhered to and any change to such schedule must be approved by the Coordination Group. In any case, all presentations must be completed by the end of the scheduled period.
- vii. The Coordination Group must ensure that each group has returned borrowed equipment when the presentation is complete.
- viii. The Coordination Group is responsible for mediating problems within and among groups.
- ix. The Coordination Group will make a presentation after all other presentations have been made. It should be of the same length and cover the “highlights” of the presentations during the term. Awards may be given for such things as:
 - most humorous presentation
 - most effective presentation
 - most original presentation
- x. The Coordination Group will submit a report to the instructor responsible for the workshop. The report should include:
 - problems encountered during the workshop.
 - recommendations for improvement.
 - other topics the group wishes to include.
- xi. The Coordination Group should ensure that a thank you letter is sent to each organization from the presenting group.
- xii. The Coordination Group should ensure that all posters are removed and that the presentation theatre is cleaned up after each presentation. Marks will be deducted from a group that does not do this follow up.

APPENDIX #1
FM REPORTS
PRESENTATION ASSESSMENT

Date: _____ Assessor: _____

Organization Presented: _____ Set: _____

Group Members:

1.	2.
3.	4.
5.	6.
7.	

Marks Breakdown:

- | | |
|-------------------------------------|----|
| 1. <i>Audio Visual</i> | 30 |
| 1. Relevance | |
| 2. Clearness | |
| 3. Profesional Quality | |
| 4. Organization | |
| 2. <i>Speech</i> | 30 |
| 1. Clarity | |
| 2. Pace | |
| 3. Volume | |
| 4. Quality | |
| 5. Smoothness of Speaker Changeover | |
| 6. Articulation | |
| 3. <i>Topic</i> | 20 |
| 1. Interesting | |
| 2. Informative | |
| 3. Contents: | |
| • History | |
| • Financial Information | |
| • Organizational Structure | |
| • Product or Service | |
| • Marketing and Distribution | |
| • Scope and Diversity, etc. | |
| 4. Continuity | |
| 4. <i>Presentation</i> | 20 |
| 1. Uniqueness | |
| 2. Use of Props | |
| 3. Backdrop | |
| 4. Lighting | |
| 5. Organization of Material | |