

## **Tentative Syllabus**

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

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**Spring 2018**

**785-218-4755**

Week of

Jan. 15	Review of syllabus; Business environment today
Jan. 22	Markets
Jan. 29	Markets; Dow, S&P 500, NASDAQ
Feb. 5	Markets; buying stock; SEC filings
Feb. 12	Paper discussion: Our rapidly changing world; Overview of accounting
Feb. 19	Accounting; Income Statement
Feb. 26	Income Statement Markets quiz
March 5	Groundhog Day: Income Statement
March 12	Common Size Analysis; Balance Sheet
March 19	SPRING BREAK
March 26	Company case I: CVS, Walgreen, ExpressScripts Balance Sheet and Cash Flows
April 2	Balance Sheet and Cash Flows
April 9	Cross: Looking at EBITDA, goodwill and impairment; Company case: Your favorite companies
April 16	Financial statements exam
April 23	Personal finance
April 30	Personal finance
May 4	STOP DAY

### **Required reading**

Business media such as The Wall Street Journal and New York Times, print or online, Seeking

Alpha, Quartz, Business Insider, etc .

### Recommended

For terminology, the best online sources are [www.investopedia.com](http://www.investopedia.com) and Motley Fool. 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		15%
Regular Facebook group	15%	
Paper		15%
Markets quiz		15%
Financial statements exam		25%
Class participation		15%

### Components of Course Grade

Regular 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. 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 and the deadline.

Other likely reports could be:

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

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

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**

My office hours will be 12:30 – 2:00 on Tuesday and Thursday. I also will be available by text (785-218-4755) or email ([jgentry@ku.edu](mailto: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.

### **“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**

#### **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 J-101 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 and generally will send you a text. If you are unsure if classes are cancelled, call 864-7669 (864-SNOW). I will

also 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 uncocked 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.