

Financial Management Lesson Plan





Financial Management

Lesson Plan

SkillsUSA Customer Care
CALL: 844-875-4557
EMAIL: customercare@skillsusa.org

Financial Management

Lesson Plan

Table of Contents

04

Activity 1: Mobilize Financial Management

05

Activity: Paper Plate Goals
Activity: Goal Think-Pair-Share

06

Activity: Blob Tag
Activity: 3-2-1 Summary

07

Tips for Success
Conclusion

SkillsUSA Financial Management

Activity 1: Mobilize Financial Management

Goal of the Activity: Students will understand how SkillsUSA activities are funded and the importance of financial management.

Activity Overview: Students will list their favorite SkillsUSA activities and discover that all activities and events require funding. The class will discuss chapter funding sources including specific fundraisers. Students will demonstrate the value of goal setting. The class will establish chapter fundraising goals and set individual fundraising goals. They will discuss how to mobilize others to reach those goals. Finally, they will summarize their findings from the lesson.

Middle School Matters: Financial Management and Fundraising

Time Required: 40 minutes

Suggested participants: All middle school students

Materials Needed: Lesson PowerPoint Slide deck (optional), paper plate, stopwatch, paper (one piece per student), and pen or pencil (one per student)

Learning Objectives

Students will:

1. Identify how SkillsUSA activities are funded.
2. Explain the importance of financial management.



Facilitation Instructions

Part 1: Spark interest and set the stage (4 minutes)

Say: “*What are some of your favorite SkillsUSA activities?*” (allow for several responses)

Do: Make a list of activities on the writing surface.

Do: Point out that those activities are fun and help make the SkillsUSA experience what it is.

Say: “*What do you think these activities cost?*” (allow for several responses)

Do: Record some of these expenses on the writing surface.

Part 2: Introduce chapter fundraising activities and fiscal responsibility (6 minutes)

Do: Explain current chapter funding including any support from the school and chapter fundraisers. Discuss how students are typically involved in the fundraising activities. Answer questions about the activities.

Say: “Why is fundraising important to the chapter?” (allow for 2 or 3 responses)

Say: “Why is financial management important to the chapter?” (allow for 2 or 3 responses)

Say: “What happens if our chapter is not fiscally responsible?” (allow for 2 or 3 responses)

Do: Emphasize the importance of financial management in not only SkillsUSA, but in all things. If a chapter budget is available, share this with the class.

Part 3: Demonstrate why goals, especially fiscal goals, matter (7 minutes)

Activity: Paper Plate Goals

1. Place one paper plate in the center of the room.
2. Have students stand in a large circle around the room.
3. Instruct students that when you say, “go,” they should each step on the plate and then stand in a different place in the circle.
4. Say “go” and time the activity.
5. When all students have touched the plate and moved to a new position, announce the elapsed time.

Say: “Could you complete the activity quicker?” (allow for 2 or 3 responses)

Say: “How quick could you do it?”

Do: As a class, decide upon a time goal.

Do: Repeat the activity. If the class surpasses

the goal, celebrate. If the class did not match the goal, allow them time to strategize and repeat the activity. Then celebrate.

Say: “Why did setting a goal help you complete the activity quicker?” (allow for 2 or 3 responses)

Say: “When do you set goals at home? In school?” (allow for 2 or 3 responses)

Say: “How might a goal help with chapter fundraising?” (allow for several responses)

Do: Discuss the importance of goal setting in all aspects of life, including fundraising.

Part 4: Set fundraising goals (10 minutes)

NOTE: This part should only be used if a chapter fundraiser will be conducted.

Do: Ahead of time, select one chapter fundraiser that students will have the opportunity to participate in. Share past statistics and details about the fundraiser including the amount of money raised.

Do: Discuss an appropriate chapter goal or goals for the fundraiser. Have students consider total raised, member participation, and the fundraiser impact. Write the goal or goals on the writing surface. *NOTE: If these goals have been set ahead of time, simply share these with the class.

Activity: Goal Think-Pair-Share

1. Have students write down one personal goal they have for the fundraiser. (allow 90 seconds)
2. Instruct students to share their goal with a partner. (allow 90 seconds)
3. Have several students share aloud with the class.

Do: Point out that just like we need help to reach goals in life, we also need help to reach our fundraising goals.

Part 4: Mobilize others to help reach the goal (7 minutes)

Do: Ahead of time, find an open space for Blob Tag.

Activity: “Blob Tag” from SkillsUSA Ignite (pg. 140) or SkillsUSA Propel (pg. 3)

1. Specify activity boundaries.
2. Select one student to start as “the blob” and attempt to tag others.
3. Explain when a player is tagged, they become part of the blob by joining hands.
4. If the activity goes quickly, have students play a second time.

Say: “What was the goal of the activity?” (allow for 2 or 3 responses)

Say: “How was the goal accomplished?” (allow for 2 or 3 responses)

Say: “How did ‘the blob’ mobilize individuals to accomplish the goal?” (allow for 2 or 3 responses)

Say: “How can we mobilize individuals and resources to accomplish our goals at home? In school? With the SkillsUSA fundraiser?” (allow for 2 or 3 responses)

Do: Explain that “mobilizes individuals and resources to accomplish a goal” is one descriptor of Leadership, an Essential Element of the SkillsUSA Framework.



Part 5: Closing (8 minutes)

Activity: 3-2-1 Summary

1. Have students share something they learned today. (allow for 3 responses)
2. Have students share something they enjoyed today. (allow for 2 responses)
3. Have students share one question they have about chapter financial management and fundraising. (allow for 1 question and then answer)
4. If time allows, repeat the activity.



Tips For Success

- ✓ Find an open space for Part 4 and the Blob Tag activity.
- ✓ Be prepared to share about chapter finances and discuss fundraising opportunities.
- ✓ Collect student goals to use during the chapter fundraiser.
- ✓ Listen to students' questions and discuss those responses with other classes.

Conclusion

Most chapters must raise money to fund the activities members enjoy. The money raised doesn't have to be the only gain from the fundraiser. Components and Essential Elements of the SkillsUSA Framework should be practiced in all chapter fundraising events.

Expand your Skills

View the [Chapter Fundraising One-Pager](#) to gain insight about conducting an activity. A quick internet search will produce hundreds of unique fundraising ideas.

Supporting Resources

Program of Work Toolkit





Copyright © 2025

SkillsUSA Customer Care

CALL: 844-875-4557

EMAIL: customercare@skillsusa.org