



**La Crosse Public Education Foundation  
Classroom Innovation Grant Application**

**Section 1: Personal Information:**

Name : **Rick Klein**  
School: **La Crosse Logan High School**  
Position/Title: **Personal Finance/Business Teacher**  
School Phone: **608-789-7700 x7743**

**Section 2: Basic Project Information:**

Project Title: **Logan Investment Club**

Total Request \$ **2,000**

Signature of Applicant \_\_\_\_\_

Signature of Principal \_\_\_\_\_

Signature of IT Department Rep (if applicable) \_\_\_\_\_

The intention of the Foundation is to fund projects not covered by the regular school budget. Please document that regular avenues of funding have been exhausted. (i.e. requests to Principal and curriculum supervisors)

**Section 3: Project Description:**

- I. **By the Fall of 2011, Mr. Klein's personal finance and business management courses would invest money into the market, allowing students to develop greater financial literacy and decision making skills by researching and making real investments in stocks, bonds, mutual funds, and money market funds.**

II.

Objectives of Project	List the corresponding district/school/curriculum goals (if applicable)	State how you will evaluate whether objectives are met.
<b>Make wise decisions in regards to making financial decisions related to planning, saving and investing</b>	<b>Personal Financial Standard: <u>Planning, Saving, and Investing D.12.5.1</u> Develop and justify the best investment and/or savings options to achieve particular goals</b>	<b>Group planning; group collaboration; committee formation for discussion and evaluation; hopefully a profit will be earned.</b>
<b>Match appropriate financial services and products with specified goals</b>	<b>Personal Financial Standard: <u>Planning, Saving, and Investing D.12.2.4</u> Select appropriate financial services and products based on evaluation of service/product information</b>	<b>Daily/Weekly logs; evaluation and research of online reports, charting, and forecasting of stocks, bonds, and funds; hopefully a profit will be earned</b>
<b>Apply strategies for creating wealth/building assets</b>	<b>Personal Financial Standard: <u>Planning, Saving, and Investing D.12.1.3</u> Identify and assess various means of building wealth</b>	<b>Evaluating results of stocks; reevaluating whether to buy, hold or sell a stock, bond or mutual fund</b>

III.

Activities to Accomplish Objectives	Who Will Be Responsible for Implementation	Resources Needed (not financial)	Timeframe to Accomplish
<b>Investment Club Meetings</b>	<b>Student Investment Committee members led by a student leader(s) (CEO or president)</b>	<b>Journals; spreadsheets; online stock, bond, and mutual fund screeners</b>	<b>Full School Year</b>
<b>Classroom Involvement</b>	<b>Teacher -led discussions as well as student tracking of investments within classroom projects</b>	<b>N/A</b>	<b>Full School Year</b>
<b>Online Trading</b>	<b>Teacher and student leaders will buy and/or sell investments online</b>	<b>An online trading brokerage firm (ETrade, Scottrade, etc.)</b>	<b>Full School Year</b>

IV. What is the lifespan of this project?

**Although no one can predict the stock market, this investment club should last for years to come. Students will track their investments and review their portfolio throughout each semester to see how their stocks have performed. A new group of students will take over the next semester with the current portfolio.**

V. Approximately how many students will be affected by this project? Explain your number.

**The goal is to include all Personal Finance and Business Management courses at Logan High School. Our hope is to involve all students within the courses (approximately 100 students per semester) in stock/bond/mutual fund screening and selection. Investment Club leaders (from each course) will serve on the "Board of Directors" where they will make executive decisions for selling and buying shares.**

VI. Please state how you will collaborate with...

Other organizations in the community (if applicable)

**Financial and investment advisors would be invited to attend classrooms and/or club meetings to discuss different planning, saving and investing strategies. This would be an excellent way to get our community involved with financial education in our high school.**

**Another idea we have for this Investment Club is to "give back" to our community, specifically the *La Crosse Public Education Foundation*. Our Board of Directors would decide an amount of our investment profits to donate back to the LPEF. Our hope is to continually donate money to the LPEF in hopes that other teachers within our school district could benefit by receiving future innovative grants.**

Other schools in the district (if applicable)

**Other schools such as Central High School would be invited to our meetings and classrooms to see how our investment club works. If we are granted money for this club, I am hopeful that other schools would become involved in their own investment clubs. It would be nice to have competitions between schools in the future.**

Other departments/classrooms (if applicable)

N/A

VII. What will happen to the project at the conclusion of the grant? If it is to continue, how will it be sustained?

**As stated previously, our hope is to increase our market value each semester by educating students on financial literacy skills involving planning, saving, and investing. If the students and the instructors do their jobs well (and with a little luck), we will be able to sustain this project for a number of years to come as our market value would increase each semester.**

VIII. How could the project be shared with other teachers and schools to benefit more students?

**Staff members would be able to share their opinions and personal experiences while investing to benefit our students involved in this project. Once we get things going, I'd like to see other classes such as Accounting, Introduction to Business, etc. become involved in the project (such as stock screening and researching) to peek their interest in future and more in-depth involvement with this project. Other interested teachers would be welcome to attend Board of Director meetings to assist in investment selections or opinions.**

**Section 4: Budget Information:**

Item	Supplier	Budgeted Amount
<b>Investment Club Seed Money</b>	<b>N/A</b>	<b>\$2,000</b>

Total request: **\$ 2,000**

Other sources of funding for this project (if applicable): **N/A**

Total budget to accomplish project: **\$ 2,000**

## **Section 5: Summary:**

How will this project bring visibility to LPEF in the community?

**To my knowledge, this project has never been done in the La Crosse School District before. With the growing need for financial literacy among students today, this project would be another incredible opportunity for students to learn appropriate and real-life strategies involved in planning, saving and investing. I believe the community would be very interested and accepting of an Investment Club at Logan High School as financial literacy is such an essential skill today. We would stress the importance of long-term planning for retirement and a successful financial future.**

**As previously mentioned, we would like to donate portions of our profit to the LPEF which we believe would be a great way for our students to work directly with the LPEF. If granted the money to start this Investment Club, our job would be to do our best to gain money for our school district and its innovative ideas!**

Please provide a one paragraph summary of your project including an explanation of why we should fund your project.

**According to the National JumpStart Coalition Survey that is given to high school seniors every other year, students continue to fail in financial literacy knowledge. As a personal finance teacher at Logan High School, I continue to stress to our students the importance of budgeting, loans and credit, insurance, bank and credit union services, and of course, investing. In the investing unit, I try to bring in as many real-life situations as possible. Having money to start up a student-run Investment Club at Logan High School would be yet another opportunity for students to learn valuable life skills toward becoming financially savvy. I believe it is my responsibility to help students achieve these financial goals, and I hope to be given the opportunity to lead these students toward financially successful futures in investing and saving. Finally, I see this as a unique opportunity for our Investment Club to “give back” to the LPEF in the form of investment profits. This money could help support other innovative ideas in the School District of La Crosse.**