Lesson Plan Example

Introduction: This document is an example of the completed Train the Trainer Lesson Plan Template.

Course information:

Course title: How to balance a checkbook

Instructor: Luna Tarte

Start/end date(s) and time(s): Friday, March 2, 1:30-3:00 p.m.

Location: Administrative building, room 221

Audience:
There will be 5-10 participants with varied experiences in math and banking. Some participants may already know how to balance a checkbook. They need the training because it is a prerequisite to the Bank Teller Orientation. All participants are new hires to the organization and are local.

Objectives:
After this training you will be able to:

• balance a checkbook with 100% accuracy by reconciling and recording financial transactions
• identify strategies to ensure timely and accurate records within 1-2 days

Purpose:
A balanced checkbook can help you determine quickly if there are any errors. Banks can still make mistakes or sometimes clients forget they made an ATM withdrawal or a debit card purchase. This course is a prerequisite to the Bank Teller Orientation. As a bank teller, you will occasionally get questions from clients regarding their accounts so it is essential to be able to quickly read and understand all the types of bank documents. Additionally, you will have the opportunity to share best practices with your clients on how to keep accurate and timely records.

Materials:
Timer, dry erase marker, 11 copies of check register sheets (attached), 11 Scenario sheets (attached), 11 pencils with erasers, 11 class surveys, 4 sheets of sticky poster paper, four boxes of markers, How to Balance a Checkbook video, computer, projector, projector stand, 11 calculators, 11 learning log worksheets

Assessment strategies:
Participants will assess their partner’s check register and develop a list of strategies to help ensure accurate and timely records.
Participant engagement methods:
Participants will fill out a check register, and discuss ways to be successful at balancing a checkbook. Participants will work in pairs to list strategies that will help ensure accurate and timely records.

Training outline:
1. Introduction and welcome (5-10 min) - Say, “Hi, my name is Luna and welcome to the How to Balance a Checkbook training. This training will last approximately an hour and a half. We will take a five-minute break after the first half hour. Restrooms are down the hall and to the left. You are allowed to have drinks and snacks in the room. Vending machines are by the restrooms. Please put your cell phones on silent and if you have an emergency that needs to be attended to, step into the hallway to take your call. In the event of an emergency that requires evacuation, follow me as we exit left into the hallway, down the stairs, and to the other side of the east parking lot. I will take the roster with me and verify you are all present. If you are not with us and you hear the instructions to evacuate, meet us at the east parking lot.”

2. Icebreaker activity (5 min) - Say, “Before we get started, let’s go around the room and take turns telling the group your name, department, and your experience with the banking industry.” Ask if there are any volunteers to go first or ask a person to start.

3. Objectives and purpose (2 min) - State objectives and purpose above. Then say, “To meet our objectives, we’ll discuss what items you will need to balance a checkbook, how to do it, and some strategies to stay organized.”

4. Attention-grabber (5 min) - Say, “Let’s begin with how might this topic be important to you. Pair up with someone next to you and discuss the following questions. You will have three minutes to discuss with your partner. Then, I will stop you and volunteers will have an opportunity to share with the group.” On the marker board, write the following stems, “Please share an experience as a result of not balancing your checkbook.” “What do you hope to get out of this course?” Have participants pair up with each other. Allow three minutes for participants to share with their partner and two minutes for volunteers to share with the entire group.

5. What you need in order to balance a checkbook (5 min) - Say, “We have discussed how important this topic will be as you begin your new jobs as bank tellers. Now, let’s discuss what resources you think may be needed in order for us to meet our first objective, and that is how to balance a checkbook with 100% accuracy by reconciling and recording financial transactions.” Ask participants to share what they think they need in order to register a checkbook. Write them on the board as participants share.

6. Show How to Balance a Checkbook video (5-15 min) - Say, “We have discussed the different resources and skills needed to balance a checkbook. Now, we will watch a video, How to Balance a Checkbook. As you watch the video please jot down anything new or interesting you learned. After the video, there will be an opportunity for everyone to share.” After showing the video, ask participants was there anything surprising or new they learned. Allow 5-10 minutes for sharing.

7. 5-minute break

8. Practice (participant engagement/assessment) (10 min) - Give each participant a check register sheet and a scenario sheet. Say, “Now we will have an opportunity to practice filling out a check register.” Give participants the following instructions: Each scenario
sheet will have situations that involve different money transactions. Use the scenarios to fill out the check register sheet provided. Each participant will get 5 minutes to fill out the register. When completely filled out, participants will trade check registers to see if both partners reached the same balance.

9. Objective one summary (5 min) - Say, “To summarize, we have discussed what resources and skills are needed to balance a checkbook with 100% accuracy, we watched a video that showed the steps to completing a checkbook. Then, we practiced filling out a check register. Does anyone have any questions?” Answer any questions that arise.

10. Participant engagement (20 min) - “Now, we will cover our second objective for the class which is to identify strategies to ensure timely and accurate records within 1-2 days”. Divide participants into groups of three or four. Each group will get a poster paper and a box of markers. Give the following instructions: Each group will discuss what challenges may prevent clients from keeping accurate records. Then, brainstorm strategies that can be used to overcome those challenges. Someone from each group will write the challenges and strategies on the poster paper. Each group will have five minutes to identify strategies. Each group will have 2 minutes to share their strategies with the rest of the class.

11. Enrichment (if needed) - Give the participant(s) an incorrect check register. Provide the fake receipts and bank statements and have the participant find the mistake(s). Calculators are available to all participants.

**Closure:** (10 min)
Restate the objectives. Give each participant a learning log. Instruct participants to fill out the learning log which asks the participant to state ways they can take the information from this training and apply it to their jobs. Participants are welcome to share with the group parts of their learning logs.

**Participant evaluation:**
Participants will be given a course survey at the end of class.

**Instructor reflection:**
There were several questions about the difference between a debit and a credit - make sure to address the differences after the video.
The room was small, but a great size for the eight participants that showed up. Next time, if more than ten participants register for the class, I may need to book a larger room.