

## Excel Portfolio Project Fundraiser

**Problem:** You find yourself frequently collecting money from your students for various projects. You are aware that you are responsible for accurately maintaining records and making daily deposits, and you are seeking an easier and more accurate system of accountability. You have also wondered from time to time if the fundraiser you just held actually made enough money to repeat next year. You recently learned to use Microsoft Excel, and you have decided that you will make use of this program in an attempt to answer that nagging profit question while maintaining records for the sake of accountability.

**Directions:** Below is a list of items you sold to raise money for a field trip to the Museum of Natural History in Little Rock.

ITEM	Wholesale	Retail	NO. SOLD
Book Set 1	13.00	17.45	14
Book Set 2	9.00	13.45	22
Book Set 3	12.00	15.85	7
Book Set 4	5.00	7.99	37
Book Set 5	10.00	12.89	13
Posters	4.00	5.95	23
Pencils	.05	.10	340
Software	12.00	14.95	12
Puzzles	4.00	5.95	8
Bookmarks	.25	.50	325

**Wholesale indicates what you paid for the merchandise. Retail indicates what you collected from your customers.**

### On Sheet 1:

- Create a worksheet using the above information.
  - Add an appropriate title for this table of information and rename the sheet tab using the same name as the title of the table. (For example: Fundraising for Museum Field Trip)
  - Add a column and a formula that will calculate the total amount of money collected (Retail) for each product sold. (Sales per item = Retail \* Number Sold)
  - Add a column and a formula that will calculate the total amount of money paid out (Wholesale) for each product sold. (Cost per item = Wholesale \* Number Sold)
  - Gross sales are the sum of all the money you collected from every item you sold. Using a formula, make this calculation, correctly place the information, and correctly label the information. (Total of all your retail sales)
  - You must also find out how much it cost to purchase all the products you sold. Using a formula, make this calculation, correctly place the information, and correctly label the information. (Total of all your wholesale costs)
  - You must pay Arkansas sales tax on your gross sales. The current sales tax rate in your area is 7.25%. Using a formula, make this calculation, correctly place the information, and correctly label the information. (Taxes = Gross Sales \* 7.25%)
  - Calculate your total profit using a formula, and correctly place and label the information.
  - (Total Profit = Gross sales – Taxes – Wholesale Costs)
  - Using formulas, answer the following questions in separate cells on your spreadsheet. Remember to label the information clearly. (For example: 30% of gross? or Percentage profit earned?)
- (1) Would you have made more money if you had selected to receive a flat 30% of gross sales?
  - (2) What percentage of profit did you actually receive?

### On Sheet 2:

Prepare a worksheet that includes the following:

- A list of ten students' first and last names in column A (last name, first name)
- A list of the items sold in columns B-K (Book Set 1 through Bookmarks)
- Divide the number of items sold among the listed students. Refer to the directions for the number of items sold in each category. (For example, 23 posters were sold. Divide these 23 posters among your ten students)
- Add a column and formula that will total the items sold per student. (How many total items did Student A sell?)
- Add a row and formula that will total the number of individual items sold. (How many posters did you sell? The answer should be the same as the number provided in the directions.)
- Add an appropriate title for this table of information and rename the sheet tab—Items Sold by Individual Students

### On Sheet 3:

- Prepare a pie graph or column chart for each student illustrating items sold per student.

This graph will visually answer the question, "What part of Student A's sales was bookmarks and what part was book set 1?" Make sure the chart title displays the student's name (first and last). You will create one pie graph or column chart for each of your ten students. Place the graphs one beneath the other, all on sheet 3. Watch the page breaks—you can probably get three or four on each page.

- Rename the sheet tab—Individual Student Graphs

**TIP:** Select a student's first and last name. Hold down the CTRL key and select the item headings (for example, Book Set 1 through Bookmarks), **and** select the number of items that particular student sold in each item category.

### Additional Directions:

- Shade cells or cell ranges as needed to make the worksheets easier to use.
- Key your first and last name somewhere on every worksheet (for identification purposes). Save the entire workbook as **First Name Last Name Excel Fundraiser** in your personal folder or in/on your storage device (floppy disk, CD RW, Thumb Drive, Flash Drive, etc.) Print the information from each sheet.
- Sheets 1 and 2 should be printed **a second time**—this time with all the formulas displayed or visible. (Tools; Formula Auditing; Formula Auditing Mode **OR** Hold down the CTRL key and click on the ~ [Tilde]). Repeat the process to turn **off** formula auditing mode. Place these second prints behind their corresponding first prints. Staple all of the print jobs together, correctly label the packet of prints, and place the packet in the "Submit Basket" for grading.

**TIP:** To print a worksheet with formulas displayed:

- 1) On the **Tools** menu, point to **Formula Auditing**, and then click **Formula Auditing Mode**. A second option is to hold down the CTRL key and click on the ~ (tilde key).
- 2) On the **File** menu, click **Print**.
- 3) Under **Print what**, select the option to print the active sheet(s).

# Excel Portfolio Project Rubric Fundraiser

**(Must be submitted with the project for grading)**

Description	Point Value	Points Earned
Sheet 1 includes <ul style="list-style-type: none"> <li>• Appropriate title for the table of information</li> <li>• Table of information correctly entered</li> </ul>	20	
Sheet 1 also includes correct <b><u>formulas</u></b> and <b><u>labels</u></b> for <ul style="list-style-type: none"> <li>• Total amount of money collected for each product</li> <li>• Total amount of money paid out for each product</li> <li>• Gross Sales</li> <li>• Wholesale Costs</li> <li>• Taxes</li> <li>• Profit</li> <li>• 30% Profit?</li> <li>• Percentage of profit received?</li> </ul>	<b><i>See Additional Directions</i></b> 80 (10 points each)  <b>**Points can only be awarded if printed with formulas displayed**</b>	
Sheet 2 includes <ul style="list-style-type: none"> <li>• Names of ten students in column A</li> <li>• Items Sold in columns B-K</li> <li>• Sold items distributed among the students</li> <li>• Appropriate title for the table of information</li> </ul>	20 (5 points 5 points 5 points 5 points)	
Sheet 2 also includes correct <b><u>formulas</u></b> and <b><u>labels</u></b> for <ul style="list-style-type: none"> <li>• Total items sold per student</li> <li>• Total number of individual items sold</li> </ul>	<b><i>See Additional Directions</i></b>  20 (10 points each)  <b>**Points can only be awarded if printed with formulas displayed**</b>	
Sheet 3 includes <ul style="list-style-type: none"> <li>• Ten student pie graphs or column charts</li> <li>• A graph or chart title that displays the student's first and last name</li> <li>• Each chart is placed one beneath the other on Sheet 3</li> </ul>	50 (40 points 5 points 5 points)	
Sheets 1 and 2 were printed correctly (displaying formulas) and <b>placed behind corresponding sheets</b>	10	
Total Points Possible—200	Total Points Earned	

**NOTES:**