

Curriculum Framework

A Reference Guide for the Business, Marketing, and Finance Career Pathway

**Albuquerque Public Schools
Career Technical Education Department
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CAREER AND TECHNICAL EDUCATION

Career and Technical Education (CTE), a formal part of American education since the first federal vocational education law was passed in 1917, is proactively responding to an educational reform agenda and to a changing national and global economy. CTE now is increasingly linked to high academic standards as well as particularly responsive to our nation's need for a labor force prepared with the diverse skills required for our knowledge-based economy. CTE provides relevant experiences and enhances opportunities for learning, careers, and further education.

PURPOSE OF THIS GUIDE

The goal of this guide is to provide an integrated curriculum framework that blends the learning and performance expectations in the Business, Marketing, and Finance Pathway with New Mexico core academic standards and expected workforce skills.

This guide contains:

- **Course descriptions** for each course offered within the Business, Marketing, and Finance Pathway,
- **Foundation Standards** that include critical academic content standards necessary for all courses offered in the Business, Marketing, and Pathway, and
- **Pathway Standards and Assessment Illustrations** specific to each course.

BUSINESS CAREER PATHWAY

This career pathway is designed to provide a foundation in business for students in the Albuquerque Public Schools. The pathways emphasize real-world, occupationally relevant experiences of significant scope and depth. The standards are designed to integrate academic and technical preparation with a focus on career awareness, career exploration, and skill preparation. Integral components include classroom, laboratory, contextual learning, and project- and work-based instruction as well as internship, community classroom, cooperative career technical education, and leadership development. These standards prepare students for continued training, postsecondary education, and entry to a career. The courses include:

BUSINESS PATHWAY

Computer Applications for Business Technology focuses on the working knowledge of the computer as a tool to create professional documents, spreadsheets and charts, presentations, databases, web pages, research, and communication via the Internet. Topics of discussion include Communication Skills, Information Technology, Math Literacy, Career Development and Employability Skills.

Word Processing for Business is intended for the student who desires additional hands-on training in the use of computer software programs with an emphasis in word processing (e.g., Microsoft Word®). Topics include merges, macros, tables with formulas and templates used in a real-life work simulation within the classroom.

Business Communication and Technology I focuses on computer technology in the business world. In addition to exploring information technologies the student gains knowledge of basic management functions in both business and personal life, masters communications skills, investigates leadership skills, researches career opportunities and identifies workplace expectations. Successful completion of both Business Communication and Technology I and II satisfy the Communication Skills requirement for graduation.

Business Communication and Technology II focuses on the integration of information technology, communication skills, leadership skills, and workplace skills in the business world and/or post secondary education arena. In addition, the student examines career paths available after graduation. Successful completion of both Business Communication and Technology I and II satisfy the Communication Skills requirement for graduation.

Entrepreneurship is a course for the student who is curious about owning a successful company and being his/her own boss. These are only a few of the reasons to explore the possibility of becoming an entrepreneur. The course takes the student on the journey through the entire process of starting one's own business. The student selects a product or service to sell, determines who the customers are, learns how to promote the company, obtains financing, and more. The student also learns how to put together and complete a business plan by the end of the course.

Record Keeping focuses on the importance of keeping accurate records in both the personal and business areas. The student examines personal finance through budgeting, banking and credit record keeping. In addition, the student explores career opportunities in the field of record keeping. The use of technology is integrated throughout the course.

BUSINESS (continued)

Career Development — the student uses interest inventories and computer software to explore available career opportunities and to link personal interests with related career fields. The student examines basic job search skills including contacting employers, writing for a variety of purposes, practicing interviewing skills, and learning to manage money. An emphasis is placed on developing appropriate skills necessary for success in the workforce.

Business Management is an instructional program that prepares individuals to undertake management of an existing enterprise, which includes franchise operations. Emphasis is given to management, social responsibilities, legal requirements, and risks involved in the conduct of a private enterprise. The formal study of management is an increasingly critical area of importance in business with emphasis in analyzing, synthesizing and evaluating data to make decisions for the business. Areas of study are career readiness, general management, human resources development, economics, and legal issues and ethics.

Business Computer Skills for the Workplace — the student becomes proficient in the use of Windows™ and computer software programs including word processing (e.g., Microsoft™ Word), databases (e.g., Microsoft™ Access), spreadsheets and charts (e.g., Microsoft™ Excel), presentation (e.g., Microsoft™ PowerPoint®), and desktop publishing (e.g., Microsoft™ Publisher®) as well as the Internet and basic Web page design. The student becomes competent in workplace skills and is prepared for employment or advanced training. A student internship is available second semester for the student with a minimum 2.5 cumulative grade point average.

Business, Marketing, & Finance I is an innovative, introductory course which explores the world of business, marketing, and finance. This course focuses on the skills, knowledge, and attitudes demanded by employers in the workplace. Areas of study include career interests and aptitudes, employability skills, business, economic, financial, and marketing concepts. Emphasis is placed on business computer applications including word processing, spreadsheets, and multimedia applications.

Business, Marketing, & Finance II continues the exploration of business, marketing, and financial concepts. This course continues to focus on the skills, knowledge, and attitudes demanded by employers in the workplace. The student studies advanced economic, marketing, and financial concepts. Emphasis is placed on business computer applications including word processing, spreadsheets, and multimedia applications.

MARKETING PATHWAY

Fundamentals of Marketing is an introductory course that explores the processes of marketing and the channels the products/services take from the producer to the consumer. The student studies basic economic and marketing concepts. Areas of study are Career Readiness, Marketing Strategies and the Free Market Economy.

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Marketing Lab I introduces the student to marketing skills in a hands-on school-based enterprises (SBE) environment. The student develops and practices skills necessary for employment in a controlled learning situation. Areas of study are financial measures, facilities and equipment management, marketing functions, and career readiness.

In **Marketing Lab II** the student has the opportunity to demonstrate employability skills in a hands-on school-based enterprise (SBE) environment. The student practices supervising peers in a controlled learning situation. Areas of study are financial measures, facilities and equipment management, marketing functions, and career readiness.

Marketing Lab III is the capstone course for marketing lab students. The student schedules and manages peers in a controlled learning environment and applies managerial principles in daily retail activities. Areas of study are financial measures, facilities and equipment management, marketing functions, and career readiness.

Advanced Marketing provides an in-depth study of the components of the marketing mix. The student acquires knowledge in the areas of marketing planning, ethics, economics, products, services, and pricing. Other areas of study include Career Readiness, Marketing Strategies, Free Market Economy, and Marketing Research.

MARKETING (continued)

In **E-Commerce** the student studies various electronic marketing tools. Web business concepts are developed through research, design, and construction using a variety of programming languages (e.g., HTML, Java). The course provides an in-depth analysis of the impact that the Internet has on marketing functions and foundations and facilitates the student's understanding of software and Internet capabilities, providing opportunities to develop web sites for selling goods/services/ideas. The student works with general marketing and economic strategies to build and integrate a shopping cart and other business needs on a fire walled web server in order to maximize return and meet customer expectations with electronic purchases. The student learns about business principles of e-commerce, personal and business services online, buying online, doing business on the web, and developing an e-commerce web site. This course integrates reading, speaking, writing, and research through the use of business concepts, presentations, and computer technology. The student designs, writes, and produces computer-based multimedia projects.

Applied Marketing Research provides the student an opportunity to demonstrate skills needed by marketing management personnel. Areas of study include, but are not limited to, principles of research, research opportunities, research planning, and ethics. Literacy strategies (e.g., reading writing, speaking) are integrated throughout the curriculum.

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FINANCE PATHWAY

Accounting I is an introductory course in which the student learns the fundamentals of the complete double-entry accounting cycle. The student also learns basic accounting computer applications and the basics for setting up an accounting system for a single proprietorship, a partnership, and a corporation. The student learns about communication, application and computation, ethics, technology, and careers in accounting.

Accounting II emphasizes corporate accounting and provides the transition from manual accounting principles to a computerized accounting system that includes computerized journal and ledger initiation, spreadsheets, and chart applications. The student learns communication, application and computation, ethics, technology, and careers related to accounting.

Accounting III provides practical applications of accounting skills learned in Accounting I and II. Wherever possible, the student uses these skills in a real-world setting (e.g., keeping books for DECA) and engages in business simulations using enhanced computer applications. The student learns about communication, application and computation, ethics, technology, and careers in accounting.

In **Business Computer Skills for the Workplace**, the student becomes proficient in the use of Windows™ and computer software programs including word processing (e.g., Microsoft™ Word), databases (e.g., Microsoft™ Access), spreadsheets and charts (e.g., Microsoft™ Excel), presentation (e.g., Microsoft™ PowerPoint®), and desktop publishing (e.g., Microsoft™ Publisher®) as well as the Internet and basic Web page design. The student becomes competent in workplace skills and is prepared for employment or advanced training. A student internship is available second semester for the student with a minimum 2.5 cumulative grade point average.

Money, Success, and Power in Business is designed for the student interested in the financial services and its related fields. The course addresses employment strategies, business planning, and techniques to be successful in the business field. The financial services portion emphasizes the knowledge and skills necessary for career paths and entry-level positions in banks or credit unions. Money, Success and Power in Business provides a great opportunity to explore the vast world of finance and business.

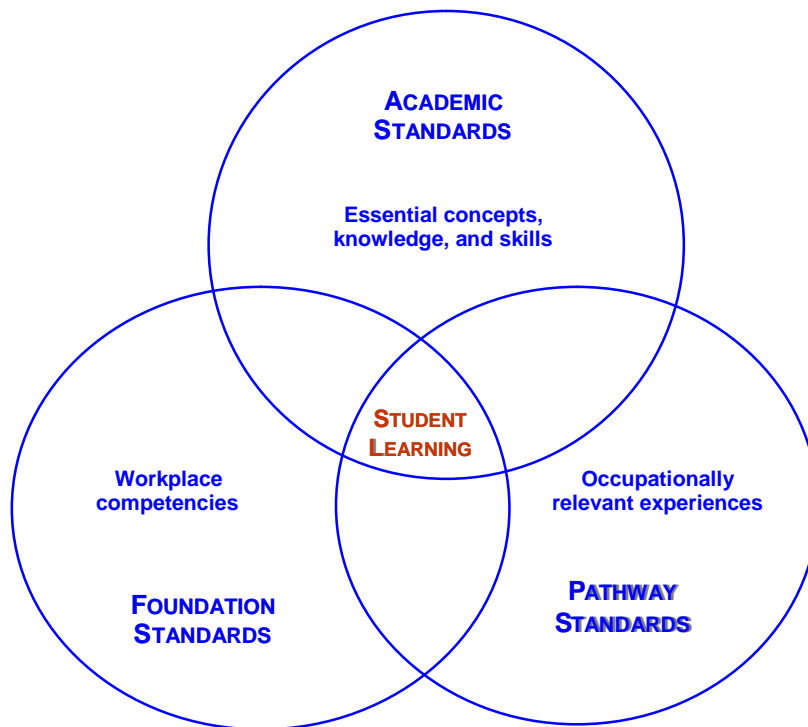
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Business, Marketing, and Finance Pathway Framework

Career and Technical Education (CTE) students need to master certain workplace skills. The Secretary's Commission on Achieving Necessary Skills (SCANS) calls these essentials "foundation skills" because they prepare students to master workplace competencies both within the curriculum and in the workplace. These foundation standards are common to all of the Albuquerque Public Schools' CTE clusters.



The Business, Marketing, and Finance Career Pathway Foundation Standards include the New Mexico Academic Content Standards.

The following three tabs contain these academic standards, and are labeled:

- **Mathematics Content Standards,**
- **Science Content Standards, and**
- **Language Arts Content Standards.**

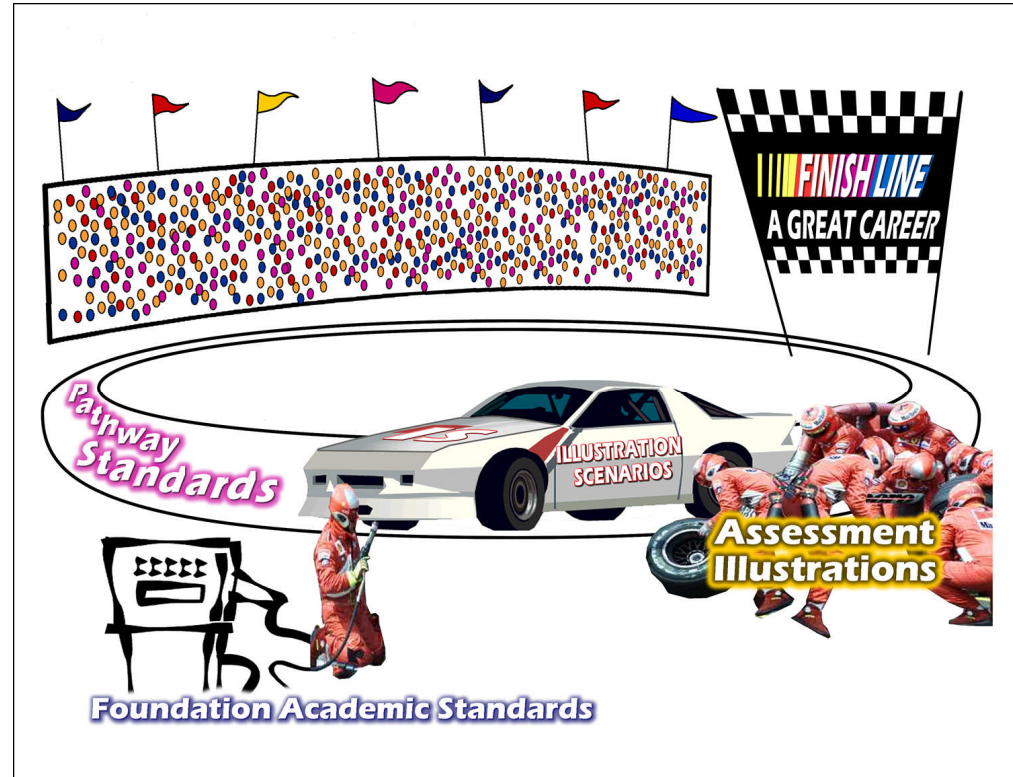
The remaining nationally recognized Foundation Standards are found under the Workforce Skills tab.

The Foundation Standards include workplace competencies. The Core Academic Standards articulate essential concepts, knowledge, and skills. The Pathway Standards contain occupationally relevant materials. When integrated, these three components intersect, creating relevant and successful student learning.

The Relationship Between Foundation Standards, Pathway Standards Assessment Illustrations, and Integration Scenarios

In understanding how these components relate to each other, consider this:

- The **pathway standards** are the track, or super-highway, providing the most direct route between where a student currently is (in school) and their ultimate destination (an engaging and productive career).
- The **illustration scenarios** (or lessons) are the vehicle that moves the student along the track, or highway, and gives students hands on experience in their chosen program of study.
- The **assessment illustrations** are the diagnostics, and instructors use the assessments provided, augmented by their own understanding and any assessment tools they create, to determine where a student is on the track and how ably and quickly they are moving toward the finish line.



- Most importantly, the **foundation standards** are the fuel. The foundation standards, which include the core academic standards, enable students to be successful in their chosen program of study.

Mathematics Content Standards

1.0 Academics

Students understand the academic content required for entry into postsecondary education and employment within the Business, Marketing and Finance Sector.

The **critical mathematics standards (CMS)** that build a foundation for the Business, Marketing and Finance Pathway are:

- CMS 1: **Use a variety of computational methods to estimate quantities involving real numbers.**
(Reference: Mathematics Grade 8, Strand Number and Operations, Benchmark Compute fluently and make estimates, Performance Standard 2).
- CMS 2: **Select and use appropriate forms of rational numbers to solve real-world problems including those that involve proportional relationships.**
(Reference: Mathematics Grade 8, Strand Number and Operations, Benchmark, Compute fluently and make reasonable estimates, Performance Standard 6.)
- CMS 3: **Develop an appropriate strategy using a variety of data from surveys, samplings, estimations, and inferences to address a specific problem.**
(Reference: Mathematics Grade 8, Strand Measurement, Benchmark, Formulate questions that can be addressed with data and collect, organize, and display relevant data to answer them, Performance Standard 6).
- CMS 4: **Demonstrate understanding of the relationships between ratios, proportions, and percents and solve for a missing term in a proportion.**
(Reference: Mathematics Grade 8, Strand Algebra, Benchmark Represent and analyze mathematical situations and structures using algebraic symbols, Performance Standard 4).
- CMS 5: **Generate different representations to model a specific numerical relationship given one representation of data.**
(Reference: Mathematics Grade 8, Strand Algebra, Benchmark Use mathematical models to represent and understand quantitative relationships, Performance Standard 1).
- CMS 6: **Represent and analyze relationships using written and verbal expressions, tables, equations, and graphs, and describe the connections among these representations.**
(Reference: Mathematics Grade 9-12, Benchmark, Represent and analyze mathematical situations and structures using algebraic symbols, Performance Standard 6).
- CMS 7: **Use a variety of computational methods (e.g. mental arithmetic, paper and pencil, technological tools).**
(Reference: Mathematics Grade 9-12 Strand Algebra, Functions, Graphs Benchmark Use mathematical models to represent and understand quantitative relationships, Performance Standard, 12).
- CMS 8: **Generate an algebraic sentence to model real-life situations.**
(Reference: Mathematics Grade 9-12 Strand Algebra, Functions, Graphs, Benchmark Use mathematical models to represent and understand quantitative relationships, Performance Standard 9).

- CMS 9: **Solve formulas for specified variables.**
(Reference: Mathematics Grade 9-12, Strand, Algebra, Functions and Graphs, Benchmark, Represent and analyze mathematical situations and structures using algebraic symbols, Performance Standard 13).
- CMS 10: **Use the four basic operations (+, -, x, ÷) with linear expressions.**
(Reference: Mathematics Grade 9-12, Strand, Algebra, Functions and Graphs, Benchmark, Represent and analyze mathematical situations and structures using algebraic symbols, Performance Standard 17).
- CMS 11: **Explain and use function notation.**
(Reference: Mathematics Grade 9-12, Strand Algebra, Functions, and Graphs, Benchmark, Understand patterns, relations, functions, graphs, Performance Standard 5).
- CMS 12: **Describe the concept of a graph of an equation.**
(Reference: Mathematics Grade 9-12, Strand Algebra, Functions, and Graphs, Benchmark, Understand patterns, relations, functions, graphs, Performance Standard 8).
- CMS 13: **Calculate the percentage increase and decrease of a quantity.**
(Reference: Mathematics Grade 9-12, Strand: Algebra, Functions and Graphs, Benchmark, Analyze changes in various contexts, Performance Standard 3).
- CMS 14: **Estimate the rate of change in the context of the problem.**
(Reference: Mathematics Grade 9-12, Strand: Algebra, Functions and Graphs, Benchmark, Analyze changes in various contexts, Performance Standard 6).
- CMS 15: **Understand the differences between the various methods of data collection.**
(Reference: Mathematics Grade 9-12 Strand Data Analysis and Probability, Benchmark Formulate questions that can be addressed with data and collect, organize, and display relevant data to answer them, Performance Standard 1).
- CMS 16: **Understand the concept of probability as relative frequency.**
(Reference: Mathematics Grade 9-12, Strand Data Analysis and Probability, Benchmark, Understand and apply basic concepts of probability, Performance Standard 2).
- CMS 17: **Know the characteristics of a well-designed and well-conducted survey.**
(Reference: Mathematics Grade 9-12, Strand Data Analysis and Probability, Benchmark, Formulate questions that can be addressed with data and collect, organize, and display relevant data to answer them, Performance Standard 2).
- CMS 18: **Compare and draw conclusions between two or more sets of univariate (one variable) data using basic data analysis techniques and summary statistics.**
(Reference: Mathematics Grade 9-12, Strand Data Analysis and Probability, Benchmark, Develop and evaluate inferences and predictions that are based on data, Performance Standard 1).

Science Academic Content Standards

1.0 Academics

Students understand the academic content required for entry into postsecondary education and employment within the Business, Marketing and Finance sector.

The critical science standards (CSS) that build a foundation for the Business, Marketing and Finance Pathway in Grades 9-12 are:

- CSS 1: **Describe the essential components of an investigation, including appropriate methodologies, proper equipment, and safety precautions.**
(Reference: Science Grade 9-12, Strand, Scientific Thinking and Practice, Benchmark, Use accepted scientific methods to collect, analyze, and interpret data and observations and to design and conduct scientific investigations and communicate results, Performance Standard 1).
- CSS 2: **Design and conduct scientific investigations that include: testable hypothesis, controls and variables, methods to collect, analyze, and interpret data, results that address hypotheses being investigated, predictions based on results, re-evaluation of hypotheses and additional experimentation as necessary, and error analysis.**
(Reference: Science Grade 9-12, Strand: Scientific Thinking and Practice, Benchmark, Use accepted scientific methods to collect, analyze, and interpret data and observations and to design and conduct scientific investigations and communicate results, Performance Standard 2).
- CSS 3: **Use appropriate technologies to collect, analyze, and communicate scientific data.**
(Reference: Science Grade 9-12, Strand: Scientific Thinking and Practice, Benchmark, Use accepted scientific methods to collect, analyze, and interpret data and observations and to design and conduct scientific investigations and communicate results, Performance Standard 3).
- CSS 4: **Identify and apply measurement techniques and consider possible effects of measurement errors.**
(Reference: Science Grade 9-12, Strand: Scientific Thinking and Practice, Benchmark, Use mathematical concepts, principles, and expressions to analyze data, develop models, understand patterns and relationships, evaluate findings, and draw conclusions, Performance Standard 4).
- CSS 5: **Use technologies to quantify relationships in scientific hypotheses (e.g., calculators, computer spreadsheets and databases, graphing software, simulations, modeling).**
(Reference: Science Grade 9-12 Strand: Scientific Thinking and Practice, Benchmark, Use mathematical concepts, principles, and expressions to analyze data, develop models, understand patterns and relationships, evaluate findings, and draw conclusions, Performance Standard 3).
- CSS 6: **Analyze the interrelationship between science and technology.**
(Reference: Science Grade 8, Strand, Science and Society, Benchmark, Understand how scientific discoveries, inventions, practices, and knowledge influence, and are influenced by, individuals and societies, Performance Standard 1).
- CSS 7: **Create multiple displays of data to analyze and explain relationships in scientific investigations.**
(Reference: Science Grade 9-12, Strand Scientific Thinking and Practice, Benchmark, Use mathematical concepts, principles, and expressions to analyze data, develop models, understand patterns and relationships, evaluate findings, and draw conclusions, Performance Standard 4).

- CSS 8: **Use mathematical models to describe, explain, and predict natural phenomena.**
(Reference: Science Grade 9-12, Strand Scientific Thinking and Practice, Benchmark, Use mathematical concepts, principles, and expressions to analyze data, develop models, understand patterns and relationships, evaluate findings, and draw conclusions, Performance Standard 3).
- CSS 9: **Evaluate the influences of technology on society.**
(Reference: Science. Strand: Science and Society, Benchmark, Examine and analyze how scientific discoveries and their applications affect the world, and explain how societies influence scientific investigations and applications, Performance Standard 3).
- CSS 10: **Identify how science has produced knowledge that is relevant to individual health and material prosperity.**
(Reference: Science Grade 9-12, Strand, Science and Society, Benchmark, Examine and analyze how scientific discoveries and their applications affect the world, and explain how societies influence scientific investigations and applications, Performance Standard 15).

Language Arts Academic Content Standards

2.0 Communication

Students understand the academic content required for entry into postsecondary education and employment within the Business, Marketing and Finance sector.

The critical language arts (CLA) standards that build a foundation for the Business, Marketing and Finance Pathway are:

- CLAS 1: **Form and refine a question for investigation using a topic of personal choice and answer that question by deciding upon and using appropriate methods, (i.e., prioritizing and organizing information, incorporating effective media and technology to inform or explain reporting in an appropriate form for a specified audience).**
(Reference: Language Arts Grade 9, Strand, Listen to, read, react to, and analyze information, Performance Standard 3).
- CLAS 2: **Respond reflectively (through small group discussion, class discussion, journal entry, essay, letter, dialogue) to written and visual texts.**
(Reference: Language Arts Grade 10, Strand: Reading and Listening for Comprehension, Benchmark, Listen to, read, react to, and analyze information, Performance Standard 2.)
- CLAS 3: **Create responses that evaluate problems and offer solutions to a reader or listener.**
(Reference: Language Arts Grade 10, Strand: Reading and Listening for Comprehension, Benchmark, Listen to, read, react to, and analyze information, Performance Standard 3.)
- CLAS 4: **Respond to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas and supporting details.**
(Reference: Language Arts Grade 11, Strand: Reading and Listening for Comprehension, Benchmark, Listen to, read, react to, and analyze information, Performance Standard 3).
- CLAS 5: **Use a variety of techniques for researching topics including summarizing, cross referencing, and use of interactive technologies.**
(Reference: Language Arts Grade 9, Strand: Reading and Listening for Comprehension, Benchmark, Synthesize and evaluate information to solve problems across the curriculum, Performance Standard 1.)
- CLAS 6: **Synthesize a variety of types of visual information including pictures and symbols.**
(Reference: Language Arts Grade 9, Strand: Reading and Listening for Comprehension, Benchmark, Synthesize and evaluate information to solve problems across the curriculum, Performance Standard 2.)
- CLAS 7: **Evaluate the information, explanations, or ideas of others by identifying clear, reasonable criteria for evaluation applying those criteria using reasoning and substantiation.**
(Reference: Language Arts Grade 10, Strand: Reading and Listening for Comprehension, Benchmark, Listen to, read, react to, and analyze information, Performance Standard 4).
- CLAS 8: **Use multiple resources to gather information to evaluate problems, examine cause and effect relationships, and answer research questions to inform an audience.**
(Reference: Language Arts Grade 10, Strand: Reading and Listening for Comprehension, Benchmark, Synthesize and evaluate information to solve problems across the curriculum, Performance Standard 3).

- CLAS 9: **Inform an audience by using a variety of media to research and explain insights.**
(Reference: Language Arts Grade 11, Strand: Reading and Listening for Comprehension, Benchmark, Synthesize and evaluate information to solve problems across the curriculum, Performance Standard 3).
- CLAS 10: **Demonstrate proficiency in accessing and sending information electronically.**
(Reference: Language Arts Grade 11, Strand: Reading and Listening for Comprehension, Benchmark, Synthesize and evaluate information to solve problems across the curriculum, Performance Standard 4).
- CLAS 11: **Examine texts for arguments and develop informed opinions.**
(Reference: Language Arts Grade 9, Strand, Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 1).
- CLAS 12: **Support informed opinions by providing relevant and convincing reasons, using various types of evidence, language, and organizational structure, and demonstrating an awareness of possible questions, concerns, or counter-arguments.**
(Reference: Language Arts Grade 9, Strand, Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 2).
- CLAS 13: **Create and use criteria to evaluate the effectiveness of communication.**
(Reference: Language Arts Grade 9, Strand, Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 3).
- CLAS 14: **Read critically and independently to draw conclusions from research.**
(Reference: Language Arts Grade 10, Strand, Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 5).
- CLAS 15: **Use language persuasively in addressing a particular issue.**
(Reference: Language Arts Grade 11, Strand, Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 1).
- CLAS 16: **Research, define, and present issues of public concern.**
(Reference: Language Arts Grade 12, Strand, Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 1).
- CLAS 17: **Accurately interpret information from and detect inconsistencies in a variety of informational, literary, and technical texts.**
(Reference: Language arts Grade 9, Strand: Reading and Listening for Comprehension, Benchmark, Apply knowledge of reading process to evaluate print, non-print, and technology-based information, Performance Standard 3).
- CLAS 18: **Accurately interpret information presented in a technical format (e.g., charts, diagrams, tables).**
(Reference: Language Arts Grade 11, Strand: Reading and Listening for Comprehension, Benchmark, Apply knowledge of reading process to evaluate print, non-print, and technology-based information, Performance Standard 5).
- CLAS 19: **Synthesize and organize information from a variety of sources in order to inform and persuade an audience.**
(Reference: Language Arts Grade 11, Strand: Speaking and Writing for Expression, Benchmark Demonstrate competence in the skills and strategies of the writing process, Performance Standard 2).
- CLAS 20: **Demonstrate control of grammar, paragraph and sentence structure, diction, and syntax.**
(Reference: Language Arts Grade 9, Strand: Writing and Speaking for Expression, Benchmark Apply grammatical and language conventions to communicate, Performance Standard 3).
- CLAS 21: **Read critically and independently to draw conclusions from research.**
(Reference: Language Arts Grade 10, Strand: Reading and Listening for Comprehension, Benchmark, Demonstrate critical thinking skills to evaluate information and solve problems, Performance Standard 5).

- CLAS 22: **Use discussion with peers as a way of understanding information.**
(Reference: Language Arts Grade 9, Strand, Reading and Listening for Comprehension, Benchmark, Apply knowledge of reading process to evaluate print, non-print, and technology-based information Performance Standard 5).
- CLAS 23: **Effectively use a variety of interactive technologies to enhance understanding of reading selections e.g., internet, email, CD-ROM, on-line publications, digital images, video).**
(Reference: Language Arts Grade 9, Strand, Reading and Listening for Comprehension, Benchmark, Apply knowledge of reading process to evaluate print, non-print, and technology-based information Performance Standard 6).
- CLAS 24: **Use an array of media and technologies to examine and comprehend information.**
(Reference: Language Arts Grade 11, Strand, Reading and Listening for Comprehension, Benchmark, Apply knowledge of reading process to evaluate print, non-print, and technology-based information Performance Standard 6).
- CLAS 25: **Express an informed opinion that clearly states a personal view, is logical and coherent, and engages the readers interest.**
(Reference: Language Arts Grade 9, Strand: Writing and Speaking for Expression, Benchmark, Communicate information in a coherent and persuasive manner using verbal and non-verbal language, Performance Standard 3).
- CLAS 26: **Support an informed opinion by using appropriate language, reason, and organizational structure for the audience and purpose.**
(Reference: Language Arts Grade 9, Strand: Writing and Speaking for Expression, Benchmark, Communicate information in a coherent and persuasive manner using verbal and non-verbal language, Performance Standard 4).
- CLAS 27: **Use a variety of technology tools to present information appropriate for the purpose and audience.**
(Reference: Language Arts Grade 11, Strand: Speaking and Writing for Expression, Benchmark, Apply grammatical and language conventions to communicate, Performance Standard 2).
- CLAS 28: **Develop presentations by using clear research questions and creative and critical research strategies.**
(Reference: Language Arts Grade 11, Strand Writing and Speaking for Expression, Benchmark, Apply grammatical and language conventions to communicate, Performance Standard 3).
- CLAS 29: **Make well-informed and well-organized formal presentations with a clear main point, adjusting the message, wording, and delivery to the particular audience and context.**
(Reference: Language Arts Grade 10, Strand: Writing and Speaking for Expression, Benchmark, Communicate information in a coherent and persuasive manner using verbal and non-verbal language, Performance Standard 2).
- CLAS 30: **Compose written arguments that develop and support informed opinions.**
(Reference: Language Arts Grade 9, Strand, Writing and Speaking for Expression, Benchmark, Demonstrate competence in the skills and strategies of the writing process, Performance Standard 3).
- CLAS 31: **Analyze arguments, concepts, and perspectives presented in literary works and media.**
(Reference: Language Arts Grade 11, Strand: Literature and Media, Benchmark, Use language, literature, and media to understand the role of the individual as a member of many cultures, Performance Standard 2).

Workforce Skills Foundation Standards

The critical workforce skills that build a foundation for the Business, Marketing, and Finance Pathways are:

3.0 Career Planning and Management

Students understand how to make effective decisions, use career information, and manage personal career plans, and:

- 3.1 Know the personal qualifications, interests, aptitudes, knowledge, and skills necessary to succeed in careers.
- 3.2 Understand the scope of career opportunities and know the requirements for education, training, and licensure.
- 3.3 Develop a career plan that is designed to reflect career interests, pathways, and postsecondary options.
- 3.4 Understand the role and function of professional organizations, industry associations, and organized labor in a productive society.
- 3.5 Understand the past, present, and future trends that affect careers, such as technological developments and societal trends, and the resulting need for lifelong learning.
- 3.6 Know important strategies for self-promotion in the hiring process, such as job applications, résumé writing, interviewing skills, and preparation of a portfolio.
- 3.7 Explore career opportunities in business through such programs as virtual enterprise, work experience, and internship.

4.0 Technology

Students know how to use contemporary and emerging technological resources in diverse and changing personal, community, and workplace environments, and:

- 4.1 Understand past, present, and future technological advances as they relate to a chosen pathway.
- 4.2 Understand the use of technological resources to gain access to, manipulate, and produce information, products, and services.
- 4.3 Understand the influence of current and emerging technology on selected segments of the economy.
- 4.4 Understand effective technologies for Web site development and Internet usage.
- 4.5 Know procedures for maintaining secure information, preventing loss, and reducing risk.

5.0 Problem Solving and Critical Thinking

Students understand how to create alternative solutions by using critical and creative thinking skills, such as logical reasoning, analytical thinking, and problem-solving techniques, and:

- 5.1 Apply appropriate problem-solving strategies and critical thinking skills to work-related issues and tasks.
- 5.2 Understand the systematic problem-solving models that incorporate input, process, outcome, and feedback components.
- 5.3 Use critical thinking skills to make informed decisions and solve problems.
- 5.4 Understand how financial systems and tools are used to solve business problems.

6.0 Health and Safety

Students understand health and safety policies, procedures, regulations, and practices, including equipment and hazardous material handling, and:

- 6.1 Know the policies, procedures, and regulations regarding health and safety in the workplace, including employers' and employees' responsibilities.
- 6.2 Understand critical elements of health and safety practices related to storing, cleaning, and maintaining tools, equipment, and supplies.
- 6.3 Understand the environmental and ergonomic risks associated with the use of business equipment and the financial impact of an unsafe work environment.

7.0 Responsibility and Flexibility

Students know the behaviors associated with the demonstration of responsibility and flexibility in personal, workplace, and community settings, and:

- 7.1 Understand the qualities and behaviors that constitute a positive and professional work demeanor.
- 7.2 Understand the importance of accountability and responsibility in fulfilling personal, community, and workplace roles.
- 7.3 Understand the need to adapt to varied roles and responsibilities.
- 7.4 Understand that individual actions can affect the larger community.

8.0 Ethics and Legal Responsibilities

Students understand professional, ethical, and legal behavior consistent with applicable laws, regulations, and organizational norms, and:

- 8.1 Know major local, district, state, and federal regulatory agencies and entities that affect the industry and how they enforce laws and regulations.
- 8.2 Understand the concept and application of ethical and legal behavior consistent with workplace standards.
- 8.3 Understand the role of personal integrity and ethical behavior in the workplace.
- 8.4 Understand major local, state, and federal laws and regulations that affect business and the procedural requirements necessary for compliance.
- 8.5 Know how to design systems and applications to allow access to all users, including those with cultural, physical, and cognitive differences.

9.0 Leadership and Teamwork

Students understand effective leadership styles, key concepts of group dynamics, team and individual decision making, the benefits of workforce diversity, and conflict resolution, and:

- 9.1 Understand the characteristics and benefits of teamwork, leadership, and citizenship in the school, community, and workplace settings.
- 9.2 Understand the ways in which pre-professional associations and competitive career development activities enhance academic skills, promote career choices, and contribute to employability.
- 9.3 Understand how to organize and structure work individually and in teams for effective performance and the attainment of goals.
- 9.4 Know multiple approaches to conflict resolution and their appropriateness for a variety of situations in the workplace.
- 9.5 Understand how to interact with others in ways that demonstrate respect for individual and cultural differences and for the attitudes and feelings of others.

10.0 Technical Knowledge and Skills

Students understand the essential knowledge and skills common to all pathways in the Business, Marketing, and Finance sector, and:

- 10.1 Use the marketing information management concepts, systems, and tools needed to obtain, evaluate, and disseminate information for use in making marketing decisions.
- 10.2 Understand the financial concepts used in making marketing decisions.
- 10.3 Know the product and service management concepts and processes needed to obtain, develop, maintain, and improve a product or service mix in response to market opportunities.
- 10.4 Know how promotion concepts and strategies, including advertising, sales promotion, public relations, and personal selling, are used to communicate information about products, services, images, and ideas to achieve a desired outcome.
- 10.5 Understand the methods used to determine client needs and desires and respond with selling concepts, including planned, personalized communication that influences purchase decisions and enhances future business opportunities.
- 10.6 Understand the distribution concepts and processes needed to move, store, locate, and transfer ownership of goods or services.
- 10.7 Know the pricing concepts and strategies used to maximize return and meet customers' perceptions of value.

11.0 Demonstration and Application

Students demonstrate and apply the concepts contained in the foundation and pathway standards.

Computer Applications for Business Technology Pathway Standards

Computer Applications for Business Technology focuses on the working knowledge of the computer as a tool to create professional documents, spreadsheets and charts, presentations, databases, web pages, research, and communication via the Internet. Topics of discussion include Communication Skills, Information Technology, Mathematics Literacy, Career Development, and Employability Skills.

References in parentheses refer to critical New Mexico mathematics (CMS), science (CSS), and language arts (CLAS) academic standards, National Standards for Business (NSB), State of New Mexico Career Readiness Standards (CR), the APS Language Arts Standards (LA), and the APS Mathematics Standards (MA).

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- A. The student demonstrates communication skills critical for acquiring, interpreting, evaluating, and managing information.
 - 1. Demonstrates control of spelling, grammar, word usage, paragraph and sentence structure, diction, syntax (CLAS 20) and writes legibly (NSB-Comm-IC.1; LA-VI 9.1).
 - 2. Proofreads, edits, and revises documents to ensure correct grammar, paragraph and sentence structure, spelling, punctuation, and word usage (CLAS 20)(NSB-Comm-IC.10,16; LA-VI 9.3).
 - 3. Prepares formal and informal reports and presentations using clear research questions and creative and critical research strategies (CLAS 28) using suitable format, supplemented with appropriate graphics (NSB-Comm-IC.22, LA-VI 11.2).
 - 4. Synthesizes and organizes information from a variety of sources to inform and persuade audiences (CLAS 19) and composes and produces a variety of business messages and reports using correct style, format, and content (NSB-Comm-C.26; LA VI 11.2).
 - 5. Identifies properly both print and electronic sources to avoid plagiarism (NSB-Comm-IC.8) and uses a variety of techniques for researching topics including summarizing, cross referencing, and use of interactive technologies (CLAS 5).
 - 6. Uses effective speaking strategies when preparing, organizing and giving presentations (CLAS 15)(LA-V10.2).
 - 7. Follows oral and written directions (NSB-Comm-ID.1; LA-I9.1).
 - 8. Demonstrates courtesy and respect for the speaker through active listening (NSB-Comm-ID.2; LA-I9.1).
 - 9. Listens for meaning (NSB-Comm-ID.3; LA-I9.1) and summarizes and organizes information from a variety of sources (CLAS 19).

STRAND II: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

- B. The student develops, locates, summarizes, organizes, synthesizes, and evaluates information for problem solving, writing, and research.
 - 1. Develops proper input techniques (e.g., keyboarding, scanning or mouse), including safety methods to avoid repetitive strain (NSB-IT-VI.1; CR-3B, D).
 - 2. Demonstrates basic keyboarding and computer functions (NSB-Comm-III.2; CR-3B, D) and uses technologies to quantify relationships in scientific hypothesis (e.g. calculators, spreadsheets and databases, graphing software, simulations, and

- modeling) (CSS 5).
3. Enters and manipulates numeric data using the touch method on 10-key keypad (CMS 7)(NSB-IT-VI.2; CR-3B, D).
4. Uses basic software applications (e.g., word processing, spreadsheets, databases, presentations, and graphics) (NSB-Comm-III.4; CR-3B, C, D) to present information appropriate for the purpose and audience (CLAS 27) and to collect, analyze, and communicate scientific data (CSS 3).
5. Refines documents using electronic spell check, thesaurus, and grammar check tools (NSB-Comm-III.11; CR-3B, C, D).
6. Designs and creates simple Web pages (NSB-IT-IX.2; CR-3B, D).
7. Identifies, accesses, navigates, and uses online services (NSB-IT-XII.1; CR-3B, D) and creates multiple display of data to analyze and explain relationships in scientific investigations (CSS 7).
8. Discusses rules of safe and appropriate conduct when using the Internet and e-mail (NSB-Comm-III.12; CR-4D).
9. Effectively uses online databases and search engines to find basic business information (NSB-Comm-III.13; CR-3B, D) to enhance understanding of reading selections (CLAS 23), evaluate the influence of technology on society (CSS 9), and analyze the interrelationship between science and society (CSS 6).
10. Cites sources of all types of data (NSB-IT-VII.5; CR-3D).

STRAND III: MATHEMATICS LITERACY

CONTENT STANDARD: *The student demonstrates the importance of mathematics in the development of his/her future.*

- C. The student solves mathematical problems, analyzes and interprets data, and applies sound decision-making skills.
 1. Determines correct mathematical processes and uses a variety of computation methods to estimate quantities involving real numbers (CMS 1), solves formulas for specified variables (CMS 9), and uses a variety of computational methods to solve problems (CMS 7)(NSB-Comp-I.1; MA-I.6).
 2. Uses appropriate technologies to collect, analyze, quantify relationships (CSS 5) and communicate scientific data (CSS 3).
 3. Uses computer calculators or spreadsheet software to solve mathematical problems and uses appropriate technologies to quantify relationships (CSS 5)(NSB-COMP-I.2; MA-I.2; CR-3D).
 4. Communicates understanding of problems through oral and written means (NSB-Comp-8; MA-II.1) and represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs, and describes the connections among these representations (CMS 6).
 5. Creates multiple displays of data to analyze and explain relationships in investigations (i.e., reads, and interprets tables, charts, and graphs (CSS 7)(NSB-Comp-V.1; MA-I.6).
 6. Calculates measures of central tendency (average, maximum, minimum) (NSB-Comp-V.3; MA-I.2; CR-3D).
 7. Calculates real-life math problems (e.g., gross earnings, net earnings, payroll withholdings) (NSB-Comp-VI.23, 24; MA-I.2, II.1; CR-3D) and the percentage increase and decrease of a quantity (CMS 13).

STRAND IV: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment professional growth, and employment transitions in the field of business occupations.*

- D. The student develops an awareness of career options and applies job acquisition skills.
 1. Reads critically and independently to draw conclusions (CLAS 21) and develop an awareness of various jobs and careers (NBS-CD-IV.1; CR-1D).
 2. Writes for a variety of job acquisition situations (NBS-Comm-IV.4; CD-1D).

STRAND V: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- E. The student identifies and demonstrates the skills which positively affect productivity.
 - 1. Demonstrates personal qualities related to employability (e.g., promptness, ability to get along with others, dependability, willingness to ask questions, respect for diversity, and communication skills) (NBS-CD-III.1; CR-4A).
 - 2. Demonstrates responsible behavior related to employability (e.g., respect for personal property, completion of homework assignments, and communication skills) (NBS-CD-III.2; CR-4A).
 - 3. Models a positive attitude toward schoolwork (NBS-CD-III.5; CR-4A).
 - 4. Demonstrates effective interpersonal skills (NBS-CD-III.53; CR-4A).
 - 5. Exhibits ethical behavior in school (NBS-CD-III.53; CR-4A).

Computer Applications for Business Technology

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

1–9. The student writes a fiction children's story based on a similar theme from an original publication. The story must include ideas from the original writing, original art, clip art, animation, appropriate fonts, and colors. The student presents the story to the class.

- ✓ correct spelling, grammar, punctuation, and word usage
- ✓ use of computer application of "draw"
- ✓ use of computer application of "clip art"
- ✓ use of animation
- ✓ use of computer fonts
- ✓ appropriate story theme
- ✓ citation sources

OR

1–9. The student listens to or reads and follows this scenario:

You are an Administrative Assistant to a well-known philanthropist who heads up a foundation for poor children. At work you keep all the records for this person and generally see that everything runs smoothly. In one month the philanthropist travels to an area of poverty to give food, clothing, and toys to needy children. Because he is a very busy man, you are delegated to prepare for the trip. The following tasks must be completed:

- Design a flyer to be sent out to the media and politicians promoting the impending trip and the schedule of events.
- Create invitations for the media and other influential people who will attend. Include important information (e.g., date, time, place, and type of dress – formal or informal).
- Create a menu of food to be served at the event.
- Develop a schedule that the philanthropist will follow.
- Prepare a written summary report about the trip.

After the trip, present the summary report to the Board of Directors and major donors.

- ✓ creative use of computer software
- ✓ correct spelling, grammar, punctuation, word usage
- ✓ appropriate messages sent to specific audience
- ✓ succinct report including the detail and results of the trip including budget
- ✓ proper presentation techniques

STRAND II: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

1 – 4. The student follows this scenario.

Videos Plus has hired you as a summer intern. Because your résumé shows you have Excel experience, the assistant manager has asked you to prepare a weekly payroll report for four employees. Use Excel to create the payroll report.

Worksheet Directions

- a. Worksheet: Title the worksheet VIDEO PLUS PAYROLL.
- b. For the Week Ending (put current date). Column Titles are Employee, Rate, Hours, Gross Pay, Federal Tax, State Tax, and Net Pay.
- c. Under the Employee column enter your name first and then add Valerie Cash, Alex Sandoval, and Joan Wilson. Enter the last name first.
- d. Under the Rate column enter the following figures: for you -- \$8.00, for Valerie -- \$7.50, for Alex -- \$8.25, and for Joan -- \$7.75.
- e. Under the Hours column enter the following figures: for you -- 40, for Valerie -- 38.5, for Alex -- 35, and for Joan -- 40.
- f. Total the columns for Hours, Gross Pay, Federal Tax, State Tax, and Net Pay.

Formulas to Use

gross pay = rate x hours
federal tax = gross pay x 20%
state tax = gross pay x 3.2%
net pay = gross pay - (federal tax + state tax)

Use appropriate functions to determine the average, highest, and lowest values of each column. Print both worksheet and worksheet with formulas. Present findings to a partner.

- ✓ centered and bold titles
- ✓ appropriate formulas for taxes and net pay
- ✓ formulas copied in appropriate cell
- ✓ auto sum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places
- ✓ copy of worksheet
- ✓ copy of worksheet with formulas

OR

1–10. You are an Administrative Assistant to a well-known philanthropist who heads up a foundation for poor children. At work you keep all the records for the philanthropist and generally see that everything runs smoothly. In six months the philanthropist travels to an area of poverty to give food, clothing, and toys to needy children. Because he is a very busy man, you are delegated to prepare for the trip. The following tasks must be completed:

- research the country gaining information on the culture and important people using the Internet and print sources
- mail travel agents about travel arrangements
- notify the poor country's government officials
- create a budget on costs of trip, food to be served, and gifts for the children
- design a flyer to be sent out to the media and politicians promoting the impending trip and the schedule of events
- send out invitations to the media and other influential people who will attend. Include important information (i.e., date, time, place, and type of dress – formal or informal)
- post the trip information on the foundation website
- create a menu of goodies to be served during this event
- create a schedule that the generous man will follow after the trip, send a summary report to the Board of Directors and donors of the foundation
 - ✓ creative use of computer software
 - ✓ correct spelling, grammar, punctuation, word usage
 - ✓ appropriate messages sent to specific audience
 - ✓ budget determinants
 - ✓ correct computation of budget
 - ✓ succinct report including the detail and results of the trip, including budget.
 - ✓ website design

STRAND III: MATHEMATICS LITERACY

CONTENT STANDARD: *The student demonstrates the importance of mathematics in the development of his/her future role as an employee.*

1,3–6. The student chooses four cities to record the high and low temperatures for twenty-eight days. After that period of time, the student designs a variety of tables in which to record the data collected. The student follows these steps.

Step A: Using the appropriate formulas the student calculates:

- average high for each city
- average low for each city
- maximum temperature for each city
- minimum temperature for each city range of temperature for each city

Step B: Using the data collected the student creates the following charts:

- high temperatures for each city (line chart)
- high and low temperatures for one city (line chart)
- chart comparing the average high and average low temperatures for each city (bar/column chart)

The student summarizes his/her findings in a one-page report. The student turns in a formal written report with a cover page and citation page.

- ✓ borders on the tables
- ✓ appropriate titles on tables and charts
- ✓ correct formulas and calculations
- ✓ appropriate use of types of charts
- ✓ axes on charts labeled correctly
- ✓ legends used correctly
- ✓ correct spelling and grammar
- ✓ citation page
- ✓ understanding of data collection and analysis

OR

1–4, 6. The student follows this scenario.

Videos Plus has hired you as a summer intern. Because your résumé shows you have Excel experience, the assistant manager has asked you to prepare a weekly payroll report for four employees. Use Excel to create the payroll report.

Worksheet Directions

- a. Worksheet: Title the worksheet VIDEO PLUS PAYROLL.
- b. For the Week Ending (put current date). Column Titles are Employee, Rate, Hours, Gross Pay, Federal Tax, State Tax, and Net Pay.
- c. Under the Employee column enter your name first and then add Valerie Cash, Alex Sandoval, and Joan Wilson. Enter the last name first.
- d. Under the Rate column enter the following figures: for you -- \$8.00, for Valerie — \$7.50, for Alex — \$8.25, and for Joan — \$7.75.
- e. Under the Hours column enter the following figures: for you — 40, for Valerie — 38.5, for Alex — 35, and for Joan — 40.
- f. Total the columns for Hours, Gross Pay, Federal Tax, State Tax, and Net Pay.

Formulas to Use

gross pay = rate x hours

federal tax = gross pay x 20%

state tax = gross pay x 3.2%

net pay = gross pay — (federal tax + state tax)

Use appropriate functions to determine the average, highest, and lowest values of each column. Print both worksheet and worksheet with formulas. Present findings to a partner.

- ✓ correct computations
- ✓ understanding the problem
- ✓ center and bold titles
- ✓ appropriate formulas for taxes and net pay
- ✓ formulas copied in appropriate cells
- ✓ auto sum totals

- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places

STRAND IV: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment professional growth, and employment transitions in the field of business occupations.*

1. The student participates in a project called Select the Right Career Path. The teacher asks, “Are you wondering which career path is right for you?” The teacher continues to explain to the student that in order to select a career path, he/she must know something about his/herself, the world of work and how to find occupations that are suitable for him/her.

The project consists of the following:

Self-Assessment

Through the use of personal-awareness techniques, the student identifies his/her interests, skills, values, needs and behavioral traits by answering a variety of surveys provided by the teacher.

Research

Using what he/she learned about his/her interests, the student reviews various sources of occupational information to identify occupations he/she feels best match his/her interests. The student finds three occupations that match his/her interests and uses these jobs to develop a list of career possibilities.

(Optional)

The student researches each job title on his/her list to learn more about each option. He/She gathers such information as duties, entrance qualifications, training options, salary and benefits, advancement opportunities, and positive and negative working conditions. This information can be obtained through printed literature, actual conversations with workers or from sites on the Internet.

- Make a Tentative Career Decision. Based upon what he/she knows about his/her interests and matching occupations, the student selects an occupation to pursue.

(Optional)

- Test Out the Decision

It's often impossible to determine if an occupation is right for him/her without trying it out, and there are several ways to do this. The student works as a volunteer, shadows a professional worker for a day, or interviews several people within his/her chosen field. Do something to get a feel for the real job. The student tests all his/her career options before moving onto the next step.

- Make a Final Career Decision.

Based upon what he/she knows about his/her personality and the world of work, the student selects an occupation he/she feels is the best match for him/her.

The student creates a display representing the findings of each step. In a job fair setting, the student presents his/her findings to other students.

- ✓ completion of required steps
- ✓ creative job fair display
- ✓ research findings (optional)
- ✓ citation of sources (optional)
- ✓ presentation of findings

2. The student responds to a job announcement from a classified ad or Internet job site. The student formats and prints or posts on the Web his/her letter of application and résumé. In the classroom or computer laboratory, each student displays his/her letter of application and résumé to be viewed by other students utilizing a gallery walk arrangement.

Directions/Checklist for the Letter of Application

1. Create personal letterhead with appropriate graphics.
2. Identify the job for which you are applying.
3. Mention that your résumé is attached.
4. Use concrete examples when stating the reason(s) you qualify for the job.
5. In closing, ask for a personal interview.

Directions/Checklist for the Résumé

1. Center your name, address, phone number and email address on top.
2. Set up distinct sections for which you are able to provide information. Requirements include personal information, objectives/goals, education background (e.g., skill course, major accomplishments), work experience, extracurricular or volunteer activities, skills or talents (e.g., bilingual), and a reference list with full information of each person (i.e., complete name, address, telephone number).
3. Decide on résumé presentation (e.g., layout, style, typeface).

Letter of Application

- ✓ correct style
- ✓ correct spelling, punctuation, grammar, and word usage
- ✓ inclusion of required information
- ✓ personal signature
- ✓ overall presentation of letter

Résumé

- ✓ accurate completion of required components
- ✓ correct spelling, punctuation, grammar, and word usage
- ✓ overall presentation of résumé

STRAND V: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- 1–4. The student participates in a variety of class discussions. The first involves listing personal qualities that are necessary to maintain in the workplace. The second discussion involves responsible behavior related to employability. Using information from the discussion, the class creates a checklist that is then developed into log form that the student maintains over a period of time. Once the task is completed, the student writes a report on his/her strengths and weakness providing strategies to maintain the strengths and strategies to improve the

weakness. The information is shared in a third discussion group – small group format. The student participates in a constructive suggestion session after each student presentation to provide other strategies to maintain strengths and improve on weaknesses.

- ✓ completion of log
- ✓ participation in all discussion groups
- ✓ correct use of constructive suggestions
- ✓ reflective report on strengths, weakness and strategies
- ✓ ability to listen openly to other students' suggestions

5. The student keeps a journal on how he/she maintains ethical behavior at school. identifies ethical behavior and how each is manifested in school

- ✓ Identifies ethical behavior and how each is manifested in school

Word Processing for Business Pathway Standards

Word Processing for Business is intended for the student who desires additional hands-on training in the use of computer software programs with an emphasis on word processing (e.g., Microsoft Word®). Topics include merges, macros, tables with formulas and templates used in a real-life work simulation within the classroom.

References in parentheses refer to critical New Mexico mathematics (CMS), science (CSS), and language arts (CLAS) academic standards, National Standards for Business (NSB), State of New Mexico Career Readiness Standards (CR), APS Language Arts Standards (LA), and APS Math Standards (MA).

STRAND I: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

- A. The student develops, locates, summarizes, organizes, synthesizes, evaluates information for problem solving, writing, and research, and uses a variety technology tools to present information appropriate for the purpose and audience (CLAS 27).
 - 1. Examines texts for arguments and develops informed opinions (CLAS 11) and effectively uses a variety of interactive technologies to enhance understanding of reading selections (CLAS 23).
 - 2. Identifies basic communications application software (e.g., e-mail and browser software) (NBS-IT-V.1; CR-3B, 3C).
 - 3. Analyzes arguments, concepts and perspectives presented in literary works and media (CLAS 31) to prepare documents that include a variety of media (NBS-IT-V.2; CR-3B).
 - 4. Uses application software reference materials (e.g., online help, vendor Web sites, tutorials, manuals) (NBS-IT-V.8; CR-3D).
 - 5. Uses the collaborative features of application software to complete simulated or real organization tasks (NBS-IT-V.9; CR-3D).
 - 6. Selects and uses templates and macros (NBS-IT-V.14; CR-3D).
 - 7. Enters and manipulates number data using the touch method on a 10-key keypad (NBS-IT-VI.2; CR-3B, 3D) and uses appropriate technologies to collect, analyze, and communicate scientific data (CSS 3) .
 - 8. Populates (enter data into) and edits fields and records (NBS-I-VIII.1; CR-3B, 3D).
 - 9. Sorts and retrieves data from databases (NBS-IT-VIII.3; CR-3D), uses technologies to quantify relationships in scientific hypothesis (CSS 5), and compares and draws conclusions between two or more sets of univariate data using basic data analysis techniques and summary statistics (CMS 18).
 - 10. Organizes and presents the results of data retrieval through merged documents (NBS-IT-VIII.5; 3B, 3C, 3D).
 - 11. Accesses, navigates, and uses online services (CLAS 24)(NBS-IT-XII.1; CR-3B; 3C).

STRAND II: COMMUNICATIONS

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- B. The student demonstrates communication skills critical for the acquiring, interpreting, evaluating, and managing of information.
 - 1. Organizes thoughts to reflect logical thinking when organizing projects (CLAS 25)(NBS-Comm-IA.8; LA-IIA10.2).
 - 2. Asks questions to elicit specific information (NBS-Comm-IA.13; LA-ID 9.2) to inform an audience by using a variety of media to research and explain insights (CLAS 9).
 - 3. Reads and follows directions (NBS-Comm-IB.8; LA-1A10.2).
 - 4. Examines text for arguments and develop informed opinions (CLAS 11) to compose and produce a variety of business documents and reports using correct style, format, and content (NBS-Comm-IC.22; LA-V11.2).
 - 5. Uses electronic tools to check grammar, spelling, punctuation, mechanics and word usage (NBS-Comm-IC.2, C6; LA-IIB9.3) and demonstrates proficiency in accessing and sending information electronically (CLAS 10).
 - 6. Synthesizes and organizes information from a variety of sources (CLAS 19) to edit business documents to improve content and effectiveness (NBS-Comm-IC.29; LA-VI9.3).
 - 7. Compares drafts to final documents and makes editorial changes (CLAS 20)(NBS-Comm-IC.13; LA-VI11.2) and uses criteria to evaluate the effectiveness of the communication (CLAS 13).
 - 8. Prepares formal and informal reports using suitable format, appropriate graphics (NBS-Comm IC.18; LA-VI11.2), and information appropriate for the purpose and audience (CLAS 27).
 - 9. Listens for meaning (NBS-Comm-ID.2; LA-IA10.3).
 - 10. Analyzes arguments, concepts, and perspectives (CLAS 31) to determine when more information is needed and asks appropriate questions (NBS-Comm-ID.4; LA-IA11.3).
 - 11. Uses active listening techniques (NBS-Comm-ID.9; LA-IA11.3) and creates responses that evaluate problems and offers solutions to listeners (CLAS 3).

STRAND III: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her role as an employee.*

- C. The student solves mathematical problems, analyzes and interprets data, and applies sound decision-making skills.
 - 1. Defines and uses appropriate mathematical symbols and computational methods (CMS 7) to solve given problems (NBS-Comp-I.3; MA-I.2, I.6).
 - 2. Uses a variety of computational methods to estimate quantities involving real numbers (CMS 1) and calculates answers to problems using addition, subtraction, multiplication, and division with linear equations (CMS 10)(NBS-Comp-I.4; MA-I.2, I.17).
 - 3. Selects and uses appropriate forms of rational numbers to solve real-world problems including those that involve proportional relationships (CMS 2) and calculates a variety of real life financial situations (e.g., gross earnings, simple interest, total purchase price, payments) (NSB-Comp-VI.23, 24; MA-I.12; CR-3D).

STRAND IV: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- D. The student identifies and demonstrates the skills which positively affect productivity.
 - 1. Exhibits personal qualities related to employability (e.g., promptness, ability to get along with others, dependability, willingness to ask questions, respect for diversity, and communication skills) (NBS-CD-III.A.1; CR-4A).
 - 2. Demonstrates responsible behavior related to employability (e.g., respect for personal property, completion of homework assignments, and communication skills) (NBS-CD-III.A.2; CR-4A).
 - 3. Illustrates how own personal qualities transfer from school to the workplace (NBS-CC-III.A; CR-4A).
 - 4. Demonstrates appropriate time management techniques and their application in the workplace (NBS-CC-III.A.11; CR-4A).
 - 5. Displays appropriate interpersonal skills for working with and for others (NBS-C-III.B.13; CR-4A).

Word Processing for Business

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve high goals, and produce products and presentations.*

1–10. The student follows and completes the tasks of the scenario:

You have been hired as a temp for Northpost Library. Your supervisor, Alia Johnson, has left you a list of jobs to complete. One task is to go through the overdue books list and send a letter to everyone who has an overdue book telling them the name of the book, the due date, and the late fee. Since the library is out of official stationery, create a letterhead on which to print the letters and print the envelopes needed to mail the reminders. After those tasks are completed, merge and print the letters that have books due in February. Check the clients addresses and if they have an email address listed, send their letter as an email attachment instead of regular mail. Put the tasks in a “TO DO” list format before completing them.

The student organizes the steps to complete the task:

1. Create a letterhead using a template in WORD for Northpost Library. Use the name of the library. The address is 863 Spur Circle; Northpost, MI 48000; 800-222-9999. Since you know cool free clip art Web sites, you decide to add a picture of a book to the letterhead.
2. Set up the data document with the following headings—FirstName, LastName, Address1, City, State, PostalCode, Title, DueDate, LateFee. Save the file as DUED.
3. Write the letter stating that the library records indicate that the following book is overdue. Create a table to put the information in. Tell each client that to avoid further charges, return the book as soon as possible. If the book is lost, call the library to make arrangements for its replacement. In the final paragraph thank the person for taking care of the matter in a timely fashion. Put your supervisor’s name and title at the conclusion of the letter. Save the letter as DUE.
4. Merge the letters only for the books due in February and print.
5. Set up an envelop merge, merge and print.
6. E-mail letters to clients with an email address.
 - ✓ correct sequence of list
 - ✓ creative letterhead from a template with a graphic inserted
 - ✓ correct spelling, grammar, punctuation, and word usage
 - ✓ proper format for all documents and envelopes
 - ✓ correct merge with query for February due dates
 - ✓ appropriate message sent to specific audience

STRAND II: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- 1–11. You have been hired as a temp for Northpost Library. Your supervisor, Alia Johnson, has left you a “TO DO” list of jobs. The second task she left you to do is research and prepare a report on what it would take to have a Web page created for the Library. (It doesn’t have to be long, but include all pertinent information). You will need the input of all the supervisors at the library. When you get the input back and report finished, prepare a presentation to present with your supervisor at the next department meeting.

The student organizes and completes these steps of the task:

- Get on the Internet, and look at Web sites of other libraries, pick out what is liked about them, and cite the address of each site.
- Find companies in Northpost that design Web pages and contact them for specifics.
- Write a rough draft of the report.
- Send a copy of the report to the other supervisors asking for their input. On the areas you need input, put your questions in comments. (Make a note to yourself that comments are inserted through Insert, and then comment on the menu bar in WORD). Send the report by email and ask them to put their suggestions or questions in comments also.
- When the input is returned back, prepare a final copy of the report incorporating the supervisors’ suggestions. Make the report easy to read and liven it up by putting in appropriate graphics. Make enough copies for everyone at the department meeting.
- Prepare a presentation with sound and graphics to present at the meeting.
- Ask for final input from the group after the presentation and write down suggestions.
 - ✓ report preparation in proper format with comments and proper citations provided
 - ✓ correct spelling, grammar, punctuation, and word usage
 - ✓ appropriate message sent to specific audience
 - ✓ edit of rough draft into final report
 - ✓ appropriate presentation

STRAND III: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

- 1–3. You have been hired as a temp for Northpost Library. You get an email from Ms. Johnson, your supervisor, asking you to get sandwiches and drinks catered for the department meeting when you present your Web page presentation. The number and contact person that the library works with at Veggie Delight Sandwich Shop is on her Rolodex. You need to find out what the seven participants want. Don’t forget to add your order and Ms. Johnson’s. Send a fax to the sandwich shop with the order. Prepare a fax from a template and put the order in a table. Make sure to total the order and add delivery fee and taxes.

The student organizes and completes these steps of the task:

- Looking on Ms. Johnson’s Rolodex, find that Sara Chavez is the person to contact. Her phone number is 555-3838 and the fax number is 555-3338. Call Veggie Delight Sandwich Shop and get a menu faxed to your office.

- Send an email to the other supervisors with menu selections and ask them to email you their choice.
- Select a fax template that you can put the Library's name on.

	Grilled Veggie Sandwich	3 at	\$5.95	Figure out total	<ul style="list-style-type: none"> • Fill in the heading with the appropriate information. Write a couple of lines of text informing Sara what the fax is for and the delivery date, time, and cation and contact person at the Library. • Below that text, create a table, center, format attractively, and fill it in with the order information.
lo-	Hummas Pita	2 at	\$6.95	Figure out total	
	Spicy Black Bean	1 at	%5.95	Figure out total	
Order	Spread Sandwich Veggie Pita	3 at	\$4.95	Figure out total	
	Spring Water (12 oz)	9 at	\$0.95	Figure out total	
	Delivery Fee is		\$7.50		Information:
	Sales Tax		5.8%		
	Total			Add above numbers	

- Using the formula options in Word Tables, create formulas to figure the amounts and then use the sum above option to get the total for the order.
- Fax order.
 - ✓ use of appropriate fax template
 - ✓ appropriate heading contact information
 - ✓ correct spelling, grammar, punctuation, and word usage
 - ✓ appropriate message sent to specific audience
 - ✓ creation, properly centered, and attractive format of table
 - ✓ correct formulas for order

STRAND IV: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

The student follows this scenario:

- 1–5. Your temp position with Northpost Library has turned into a summer job. Because you have proven your excellent work skills, your supervisor, Alia Johnson, has asked you to research and prepare a brief publication for new employee orientation and present it to the summer interns. She thinks a brochure would be appropriate.

Topics for the brochure include *personal qualities, responsible behavior, time management techniques* and *appropriate interpersonal skills* related to employability. In one section include your personal experiences and how you successfully transitioned from school to work.

The student organizes and completes these steps of the task:

- Get on the Internet and do a search for career and job Web sites. Copy and paste into Word information you can include in your brochure. Print information.
- Select an appropriate brochure format keeping in mind it is job related.
- Sketch a layout of the brochure. Use bullets, font changes, and color for emphasis. Insert some appropriate clip art or get the digital camera and take picture of workers in the library that illustrate your points. Use symbols to separate paragraphs of text.
- Prepare the brochure.
 - ✓ brochure prepared in proper format with contrast and emphasis of text
 - ✓ color selection enhances message instead of distracting from message
 - ✓ correct spelling, grammar, punctuation, and word usage
 - ✓ appropriate message sent to specific audience
 - ✓ insertion of appropriate clip art or pictures and symbols
 - ✓ edit of rough draft into final brochure

Business Communication and Technology I

Pathway Standards

Business Communication and Technology I focuses on computer technology in the business world. In addition to exploring information technologies the student gains knowledge of basic management functions in both business and personal life, masters communications skills, investigates leadership skills, researches career opportunities and identifies workplace expectations. Successful completion of both Business Communication and Technology I and II satisfy the Communication Skills requirement for graduation.

References in parentheses refer to critical New Mexico mathematics (CMS), science (CSS), and language arts (CLAS) academic standards, National Standards for Business (NBS), State of New Mexico Career Readiness Standards (CR), the APS Language Arts Standards (LA), the APS Mathematics Standards (MA), and Communications Skills (CS).

STRAND I: TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

- A. The student develops, locates, summarizes, organizes, synthesizes and evaluates information for problem solving, and research.
 - 1. Adheres to safety and security policies (i.e., acceptable use policy) (NBS-IT-XV.1; CR-3A-D).
 - 2. Defines and applies correct terminology of computers (NBS-IT-II.1; CR-3A-D).
 - 3. Identifies hardware components appropriate for specific tasks (NBS-IT-II.2; CR-3A-D).
 - 4. Explains the purpose, operation, and care of hardware components (NBS-IT-II.3; CR-3A-D).
 - 5. Organizes and maintains folders/directories and files using various operating systems (NBS-IT-III.2; CR-3A-D).
 - 6. Demonstrates proficiency in accessing and sending information electronically (CLAS 10), including electronic mail software to communicate with others (NBS-IT-III.5; CR-3A-D).
 - 7. Uses common application software (e.g. Word, Excel, Access, Outlook) (NBS-IT-V.2; CR-3A-D).
 - 8. Uses a wide variety of information technology resources to retrieve, analyze, comprehend, and communicate data and information (CLAS 24)(CSS 3, 5)(NBS-IT-VII.1; CR-3A-D).
 - 9. Designs a simple Web page (NBS-IT-XII.2; CR-3A-D).
 - 10. Designs a variety of publications using desktop publishing software (NBS-IT-V.3; CR-3A-D) and demonstrates a control of grammar, paragraph and sentence structure, and syntax (CLAS 20).
 - 11. Uses a variety of technology tools to present information appropriate for the purpose and audience (CLAS 27)(NBS-IT-V.2, CR-3A-D; CS-III.3).
 - 12. Sorts and retrieves data from databases (NBS-IT-VIII.3; CR-3A-D).
 - 13. Organizes and manages the result of data retrieval (NBS-IT-VIII.5; CR-3A-D)
 - 14. Evaluates the influence of technology on society (CSS 10) and analyzes the interrelationship between science and technology (CSS 6).

STRAND II: FINANCE

CONTENT STANDARD: *The student demonstrates an understanding of financial concepts as they relate to personal financial affairs.*

- B. The student identifies, develops, and demonstrates the skills to make wise personal economic decisions.
 - 1. Uses a variety of computational methods to estimate quantities (CMS 1, 7), differentiates between and calculates gross and net income (NBS-PF-4), and calculates the percentage increase and decrease in a quantity (CMS 13).
 - 2. Identifies benefits as a component of total income (NBS-PF-5).
 - 3. Identifies sources of unearned income (e.g., interest on savings, dividends) (NBS-PF-6).
 - 4. Discusses and calculates personal tax liabilities for various types of taxes (e.g., income, sales, FICA, and Medicare) (NBS-PF-12).
 - 5. Compares electronic means of transfer (e.g., debit cards, ATM) offered by various financial deposit institutions (NBS-PF-6).
 - 6. Discusses the process in maintaining a checking account (NBS-PF-4).
 - 7. Describes and calculates the steps involved in the bank reconciliation process (NBS-PF-0).

STRAND III: BUSINESS COMMUNICATION

CONTENT STANDARD: *The student understands communications as applied to personal and professional situations.*

- C. The student demonstrates competency by selecting and using appropriate forms of communication in a variety of situations.
 - 1. Forms and refines a question for investigation (CLAS 1) and informs an audience by using a variety of media to research and explain insights (CLAS 9) and communicates these insights in a clear, courteous, concise, and correct manner on personal and professional levels (NBS-Comm-I.1).
 - 2. Responds reflectively to written and visual texts (CLAS 2) and applies reading skills to gather information from print and electronic media (NBS-Comm-IB.8; LA9-I.1, 3; LA10-I.1; CS-I.2, 3).
 - 3. Reads and or listens to and follows directions (NBS-Comm-IB.8; LA9-I.1, 6; LA10-I.2).
 - 4. Evaluates the information, explanations, or ideas of others by identifying clear, reasonable criteria for evaluation applying those criteria using reasoning and substantiation (CLAS 7) and distinguishes between fact, inference, and judgment in print and electronic materials (NBS-Comm-IB.8; LA9-I.1, 7; LA10-I.2, 7).
 - 5. Reads critically and independently to draw conclusions from research (CLAS 21) and expands scope of reading materials to include businesses-related publications (NBS-Comm-IVB.11; LA9-I.5; LA10-.5; CS-.5).
 - 6. Demonstrates basic research techniques to find print and electronic information (NBS-Comm-IB.14; LA9-VI.1-5; LA10-V.1-5; CS-VI.1-3) and demonstrates proficiency in accessing and sending information electronically (CLAS 10).
 - 7. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas, supporting details, documentation, and plagiarism (CLAS 4)(NBS-Comm-IVC.8; LA9-VI.6; LA10-V.6; CS-VI.5).
 - 8. Documents properly both print and electronic sources to avoid plagiarism (NBS-Comm-IB.9; LA9-VI.1, 3; LA10-VI.1; CS-VI.4, 5).
 - 9. Uses a variety of writing skills (note-taking, letters, documents) incorporating critical listening and reading techniques (NBS-Comm-IC.13; LA9-III.1; LA10-III.1; CS-III.6, 7).
 - 10. Composes, proofreads, and edits a variety of documents using correct style, format and content and demonstrates control of grammar, paragraph and sentence structure, diction, and syntax (CLAS 20)(NBS-Comm-IC.19, 27; LA9 III.2;LA10-III.2; CS-III.1, 4, 5).
 - 11. Refines documents using electronic spell check, thesaurus, and grammar check tools (NBS-Comm-V.11; LA9-III.5; LA10-III.3; CS-III.1, 3).
 - 12. Analyzes arguments, concepts, and perspectives presented in literary works and media (CLAS 31).
 - 13. Directs courteous attention to multiple speakers (NBS-Comm-IVB.6; LA9-VI.2; LA10-VI.2; CS-V.1).

14. Assesses and responds to a speaker nonverbal message (NBS-Comm-ID.15; LA9-VI.2, 3; LA10-VI.3).
15. Participates in group discussion and role-playing (NBS-Comm-IA.5; LA9-IV.1; LA10-IV.1, 6; CS-IV.1, 4-6).
16. Uses proper telephone techniques and etiquette (NBS-Comm-IA.7; LA9-IV.1, 2; LA10-IV.2; CS-IV.5).
17. Develops presentations by using clear research questions and critical research strategies (CLAS 28) individually or as a member of a group (NBS-Comm-IA.14; LA9-I.1-3; LA10-IV. 1-3; CS-IV. 3-6).
18. Demonstrates an awareness and acceptance of international, regional, and multicultural speech (NBS-Comm-IA.17; LA9-IV.1,5;LA10-IV.1-3).
19. Makes well-informed and well-organized presentations with a clear point, adjusting the message, wording, and delivery to the particular audience and context (CLAS 29).
20. Serves effectively as interviewer or interviewee in a variety of situations (e.g. college interview, scholarship interview, job interview) (NBS-Comm-ID.31; LA9-IV.4, 3; LA10-IV. 5; CS-IV.5).

STRAND IV: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of mathematics skills in the development of his/her future role as an employee.*

- D. The student solves mathematical problems, analyzes and interprets data, and applies sound decision-making skills.
 1. Uses a variety of computational methods to estimate and calculate quantities (CMS 1, 7), applies appropriate formulas to solve problems (CMS 9) and correctly enters the formulas into a spreadsheet (NBS-Comp-I.1; MA-I.1,2).
 2. Uses the four basic operations with linear expressions (CMS 10), applies the order of operations principle when using mathematical processes (NBS-Comp-III.4; MA-I.2,3, and selects and uses appropriate forms of rational numbers to solve real-world problems including those that involve proportional relationships (CMS 2).
 3. Selects and uses appropriate tools when solving problems (NBS-Comp-I.2; MA-I.1,2).
 4. Represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs and describes the connections among these representations (CMS 6).
 5. Defines and describes components, characters and functions of spreadsheet software (NBS-Comp-V.2; MA-I.16).

STRAND V: LEADERSHIP

CONTENT STANDARD: *The student demonstrates an understanding of the personal qualities that are the basis for developing leadership skills.*

- E. The student identifies and uses leadership skills in a variety of individual and group work situations.
 1. Participates in school, community and or volunteer activities (NBS-Comm-IIA.25; CR-5D).
 2. Identifies and applies team skills in business and school environments (NBS-Comm-IIA.27; CR-5D).
 3. Identifies effective leadership characteristics (NBS-Comm-VC.1; CR-5D).
 4. Respects the rights and feelings of others (NBS-Comm-IIB.2;CR-5D).
 5. Works cooperatively with peers and authority figures (NBS-Comm-IIB.4; CR-5D).

STRAND VI: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

- F. The student develops an awareness of career options and applies job acquisition skills.
 - 1. Assesses and analyzes personal talents, values, and interests as they may relate to the future (NBS-CD-IA.6; CR-1A).
 - 2. Identifies transferable competencies and job specific skills related to career and job options (NBS-CD-IA.11; CR-1A).
 - 3. Identifies, analyzes, and researches a specific career cluster using a variety research tools (CLAS 23)(NBS-CD-II.18; CR-1C).
 - 4. Completes employment-related documents (e.g., application, résumé) (NBS-CD-VB.7, 8; CR-1D).
 - 5. Identifies the quality (i.e., grammar, paragraph and sentence structure, and syntax (CLAS 20) of the contents in a career portfolio (e.g., letter of application, employment application, letter of reference, résumé, interview tip sheet, and follow-up letter) (NBS-VB.7, 8; CR-1D) and uses a variety of technology tools to present information appropriate for the purpose and audience (CLAS 29).
 - 6. Discusses positive and negative interview techniques (NBS-CD-VC.8; CR-1D).

STRAND VII: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student understands the factors essential to a productive workforce in a culturally diverse environment.*

- G. The student demonstrates competency by identifying the skills which positively affect productivity.
 - 1. Demonstrates personal qualities related to employability (e.g., respect for diversity, communication skills) (NBS-CD-III.1; CR- E, 4A).
 - 2. Describes how honesty and integrity affect relationships with others (NBS-CD-III.3; CR-1E, 4A).
 - 3. Explains the importance of dress code, attendance, and other workplace expectations (NBS-CD-III.21; CR-1E, 4A).
 - 4. Discusses the importance of being able to work productively in a multicultural work environment (NBS-CD-III.37; CR-1E, 4B).
 - 5. Develops skills to give and receive constructive criticism (NBS-CD-III.7; CR-1E, 4B).
 - 6. Demonstrates the steps involved in handling conflict in a variety of situations (NBS-CD-III.12; CR-1E, 4B).
 - 7. Explains how decisions regarding education and work impact other major life decisions (NBS-CD-III.8; CR-1E).
 - 8. Researches career clusters using a variety of resources (NBS-CD-III.2; CR-1C, E).

Business Communication and Technology I

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

1. The student signs the district's acceptable use policy. The student then reads a summation of the safety and security policies as well as federal and state laws. The student participates in one of the groups in designing a poster to display in class. The groups are Rules for Safe and Appropriate Conduct on the Internet, Safety Policies on the Internet, Security Policies on the Internet, Federal Laws and Privacy, Privacy Information at Home and at Work.
 - ✓ correct and relevant information on poster
 - ✓ correct spelling, punctuation and grammar
 - ✓ creative design of poster
- 2–4. The student designs a presentation (e.g., PowerPoint) to identify correct hardware components and computer terminology. complete list of hardware components
 - ✓ appropriate terms
 - ✓ correct spelling, grammar, and punctuation
 - ✓ correct use of MLA formatPowerPoint Presentation:
 - ✓ delivery of presentation (e.g., timing, organization)
 - ✓ easily read fonts
 - ✓ point size variations appropriate for headings and text
 - ✓ variety of layouts that are aesthetically pleasing
 - ✓ special effects (e.g., sound) that assist in presenting an overall theme
 - ✓ no errors in grammar, capitalization, punctuation, and spelling
5. The student creates and maintains a personal folder containing his/her work.
 - ✓ existence of folder
 - ✓ student's ability to locate folder
 - ✓ inclusion of required documents in folder
 - ✓ inclusion of correct and current documents
- 6–11,13. The student designs and creates a Web page for a business he/she will develop. The student emails the choice of business to the teacher for approval. The student researches other like businesses' Websites to decide what design and components are needed. Requirements for the Web page include name of business, type of business, information about the business, graphics, and links.

- ✓ completion of all required components
- ✓ use of required format
- ✓ correct use of spelling and language conventions
- ✓ well-organized layout/design
- ✓ background that enhances page
- ✓ creatively used graphics and/or clip art
- ✓ links that work properly

In addition, the student creates an ad, business card, stationery, or brochure about the business.

- ✓ accurate information
- ✓ correct spelling, punctuation & spelling
- ✓ technological enhancements (color, bullets etc.)
- ✓ creative design

12. Given an employee payroll database on Excel, the student sorts to retrieve information to answer various questions. Sample queries may include:
- List the people and their job titles who made salaries under \$50,000. Over \$100,000.
 - Identify the average hours worked per week per department.
 - Search and identify the people who have worked less than five years. Five to ten years. Ten to twenty years.
 - ✓ accurate answers
 - ✓ correct spelling of employee names
 - ✓ use of correct text

STRAND II: FINANCE

CONTENT STANDARD: *The student demonstrates an understanding of financial concepts as they relate to personal financial affairs.*

- 1,2,4. The student uses time cards to calculate hours, gross income, deductions (e.g., state and federal income, FICA, and Medicare) and benefits to determine net income for five employees. He/She creates graphs for comparison of employees' wages and uses a circle chart or pie graph to show percentage of taxes and other deductions. The student describes his/her findings with a partner.
- ✓ accuracy of pie charts
 - ✓ inclusion of all deductions
 - ✓ correct calculations for gross and net income
 - ✓ understanding of the major concepts (e.g., gross income, net income, deductions, benefits)
3. In a brainstorming session, the student lists sources of unearned income.
- ✓ accurate list of unearned income
 - ✓ information current to relevant tax year
- 5–7. The student presents (e.g., PowerPoint) on an aspect of banking. Topics include: rights and responsibilities of using a checking account, steps involved in opening and using a checking account, banking services and how to use them, how to reconcile a bank account, check

writing tips, advantages and disadvantages of banking, how banks do business, consumer protection and banking.

- ✓ accurate information
- ✓ thorough completion of content requirements
- ✓ all sources of information are clearly identified and credited

PowerPoint Presentation:

- ✓ delivery of presentation (e.g., timing, organization)
- ✓ easily read fonts
- ✓ point size variations appropriate for headings and text
- ✓ variety of layouts that are aesthetically pleasing
- ✓ special effects (e.g., sound) that assist presenting an overall theme
- ✓ no errors in grammar, capitalization, punctuation, and spelling

STRAND III: BUSINESS COMMUNICATION

CONTENT STANDARD: *The student understands communications as applied to personal and professional situations.*

1–12, 15–17,19. The student, with a partner, researches a country (not including the United States) and develops a marketing tool for a travel agency. The student gives a marketing presentation (e.g., display, PowerPoint, Website) on the country researched to a small group. Anonymous written evaluations are completed by the listeners and are read in privacy by the presenter.

Required Country Information:

- location
- major cities, including capital
- tourist attractions
- accommodations
- roundtrip transportation
- currency used
- languages spoken
- common phrases in country's language

Required Research Information Sources:

- department of state Website
- letter of request on information from tourist bureau or embassy
- country Websites
- one document call to a travel agent
- printed information (brochures, books, travel articles)
- accurate completion of required components
- rough draft notes

- citations
- correct spelling, punctuation and grammar
- correct use of presentation materials (e.g., layout, text)
- use of persuasion

13–14,18,20. The student listens to a guest speaker from one of the countries researched. The student develops a list of questions prior to the presentation for a question/answer period after the talk.

- ✓ appropriate active listening skills
- ✓ respect for speaker and culture
- ✓ list of appropriate interview questions

STRAND IV: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of mathematics skills in the development of his/her future role as an employee.*

1–5. The student uses time cards to calculate hours, gross income, deductions (e.g., state and federal income, FICA, and Medicare) and benefits to determine net income for five employees. He/She creates a spreadsheet to present the information. The student describes the findings to a partner.

- ✓ inclusion of all deductions
- ✓ correct calculations for gross & net income
- ✓ understanding of the major concepts (e.g., gross income, net income, deductions, benefits)
- ✓ centered and bold titles
- ✓ appropriate formulas for taxes and net pay
- ✓ formulas copied in appropriate cell
- ✓ autosum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places

STRAND V: LEADERSHIP

CONTENT STANDARD: *The student demonstrates an understanding of the personal qualities that are the basis for developing leadership skills.*

1–5. The student, with a group, plans a simulated school-based meeting. He/She completes the following steps and presents to the class. After all the presentations are given, the student, in a full class setting, determines what leadership qualities are needed to plan and chair a meeting (a requirement for the STRAND V: LEADERSHIP in Business Communication and Technology II).

- Define the purpose of the meeting.
- Identify the target audience.
- Choose a meeting date and time.
- Design a room arrangement.

- e. Create a visual aid (e.g., poster) to advertise the meeting.
- f. Create a reminder memo.
- g. Develop an agenda in cooperation with key participants.
 - ✓ demonstration of team skills
 - ✓ fulfillment of each step
 - ✓ written responses to each step
 - ✓ correct spelling and language conventions
 - ✓ demonstration of appropriate behavior with others
 - ✓ appropriate list of leadership qualities

STRAND VI: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

- 1–2. The student develops a list of personal talents, values and interests. The teacher gives the student a copy of a handout of the list of attributes that employers are seeking. See www.jobweb.com. The student adds additional attributes from the teacher handout that applies to him/her. After each attribute, the student gives a real or hypothetical situation on how that attribute is transferable to a career.
 - ✓ thoughtful list of personal talents, values, and interests
 - ✓ completion of list requirements
3. The student chooses three career options or chooses from the list of fastest growing (and hottest) occupations provided by the teacher. He/She researches each job's responsibilities, working conditions, employment outlook, earnings, and education needed. The student then answers the following questions for each career:
 - Where do I get my education for this career?
 - What classes should I take in high school to prepare for this career?
 - What skills will I need?

The student reports the findings to a team member.

 - ✓ accurate completion of all tasks
 - ✓ correct use of spelling and language conventions
 - ✓ presentation techniques
4. The student completes a variety of job applications and résumé forms provided by the teacher.
 - ✓ same color ink and type handwriting throughout the application
 - ✓ no smudges or strikeouts
 - ✓ accurate information
 - ✓ correct use of spelling and language conventions
 - ✓ signature of applicant
5. The student begins to collect and store various career documents throughout the school year for a portfolio.

- ✓ necessary documents needed for portfolio
- ✓ edited and corrected documents
- ✓ correct spelling and language convention

6. The student helps complete a KWL chart on interviewing techniques. Under the “K” column, the student provides information he/she knows about interviewing techniques. Under the “W” column, the student provides questions about interviewing he/she needs to know. The teacher provides addition information including the legal aspects of the interview, etiquette, and appropriate presentation techniques of the interviewee. Finally, under the “L” column, the student shares with the class the information learned. The student, with a partner, practices simulated interview activities provided by the teacher.
- ✓ individual participation in discussions
 - ✓ correct application of interview techniques in simulated practice sessions

STRAND VII: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student understands the factors essential to a productive workforce in a culturally diverse environment.*

- 1–8. The student participates in a variety of class discussions. The first involves listing personal qualities that are necessary to maintain in the workplace. The second discussion involves responsible behavior related to employability. Using information from each discussion, the class creates a checklist. The checklist is then developed into log form that the student maintains over a period of time. Once the task is completed, the student writes a report on his/her strengths and weaknesses providing strategies to maintain the strengths and strategies to improve the weaknesses. The information is shared in a third discussion group — small group format. The student participates in a constructive suggestion session after each student’s presentation to provide other strategies to maintain strengths and to improve on weaknesses.
- ✓ completion of log
 - ✓ participation in all discussion groups
 - ✓ correct use of constructive suggestions
 - ✓ reflective report on strengths, weakness and strategies
 - ✓ ability to listen openly to other students’ suggestions

Business and Communication Technology II

Pathway Standards

Business Communication and Technology II focuses on the integration of information technology, communication skills, leadership skills, and workplace skills in the business world and/or post secondary education arena. In addition, the student examines career paths available after graduation. Successful completion of both Business Communication and Technology I and II satisfy the Communication Skills requirement for graduation.

References in parentheses refer to critical New Mexico mathematics (CMS), science (CSS), and language arts (CLAS) academic standards, the National Standards for Business (NBS), State of New Mexico Career Readiness Standards (CR), the APS Language Arts Standards (LA), the APS Mathematics Standards (MA) and Communication Skills (CS).

STRAND I: TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

- A. The student develops, locates, summarizes, organizes, synthesizes, and evaluates information for problem solving, writing, and research.
 - 1. Adheres to safety and security policies (i.e., acceptable use policy) (NBS-IT-XV.1; CR-3A-D).
 - 2. Manages folders/directories and files using various operating systems (NBS-IT-III.2; CR-3A-D).
 - 3. Uses advanced features of common application software (NBS-IT-V.10; CR-3A-D).
 - 4. Evaluates the effectiveness of software to solve specific problems (NBS-IT-V.12; CR-3A-D).
 - 5. Analyzes, accesses, exchanges, organizes, and synthesizes a variety of visual information, including pictures and symbols (CLAS 6)(NBS-IT-VII.9; CR-3A-D).
 - 6. Uses an array of media and technologies to examine and comprehend information (CLAS 25) to construct a Web page using technological enhancements (NBS-IT-XII.6; CR-3A-D).
 - 7. Creates and/or publishes a variety of publications (NBS-IT-V.2, 3; CR-3A-D) that demonstrate control of grammar, paragraph structure, and syntax (CLAS 20).

STRAND II: FINANCE

CONTENT STANDARD: *The student demonstrates an understanding of financial concepts as they relate to personal financial affairs.*

- B. The student identifies, develops, and demonstrates the skills to make wise personal economic decisions.
 - 1. Uses a variety of computational methods (CMS 7) to compare and contrast compensation packages that include varying levels of wages and benefits (NBS-PF-11.10).
 - 2. Expresses an informed opinion that clearly states a personal view, is logical and coherent, and engages the listener (CLAS 25) to explain when and why borrowing and credit card charging are used for the purchase of goods and services (NBS-PF-II.1).
 - 3. Describes the risks and responsibilities associated with using credit (NBS-PF-VII.2).

STRAND III: BUSINESS COMMUNICATION

CONTENT STANDARD: *The student understands communications as applied to personal and professional situations.*

- C. The student demonstrates competency by selecting and using appropriate forms of communication in a variety of settings.
1. Communicates in clear, courteous, concise, and correct manner on personal and professional levels (NBS-Comm-I.1) and uses language persuasively in addressing a particular issue (CLAS 15).
 2. Examines texts for arguments and develops informed opinions (CLAS 11) and applies reading skills to gather information from casual print and electronic media (NBS-Comm-IB.6; LA11-I.1; LA12-I.1, 3; CS-I.2, 3).
 3. Expands scope of reading materials to include business-related publications and reads critically and independently to draw conclusions from research (CLAS 21)(NBS-Comm-IB.11; LA11-I.7; LA12-I.1, 3; CS-I.5).
 4. Effectively uses a variety of interactive technologies to enhance understanding of reading selections (CLAS 23) and researches information using the Internet and selects appropriate materials for reports and presentations (NBS-Comm-IB.19; LA11-VI.1-3; LA12-VI.1-3; CS-VI.2, 3).
 5. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; main ideas and supporting details (CLAS 4) and understands plagiarism as unethical (NBS-Comm-IC.8; LA11-VI.6, 8, 9; LA12-VI.3; CS-VI.5, 6).
 6. Documents properly both print and electronic sources to avoid plagiarism (NBS-Comm-IC.9; LA11-VI.6; LA12-VI.3; CS-VI.1).
 7. Demonstrates control of grammar, paragraph and sentence structure, diction, and syntax (CLAS 20) and uses a variety of writing skills (e.g., note-taking, memos, letters) incorporating critical listening and reading techniques (NBS-Comm-IC.13; LA11-III.1; LA12-III.1; CS-III.6,7).
 8. Composes, proofreads, and edits a variety of documents using correct style, format and content (CLAS 20)(NBS-Comm-IC.19, 27; LA11-III.2; LA12-III.2; CS-III.2, 4, 5).
 9. Refines documents using electronic spell check, thesaurus, and grammar check tools (CLAS 20)(NBS-Comm-V.11; LA11-III.3; LA12-III.3; CS-III. 1,3).
 10. Composes business documents that reflect international differences and incorporates current practice and protocol (NBS-Comm-IC.33; LA11-III.5; LA12-III.5; CS-III.1, 4, 5).
 11. Synthesizes and organizes information from multiple sources, including speakers, and responds in an effective manner (CLAS 19) (NBS-Comm-ID.18; LA11-V.1, 2; LA12-V.1; CS-VI.1).
 12. Demonstrates a command of interactive listening techniques in a variety of settings (NBS-Comm-ID.19; LA11-V.1; LA12-V.1; CS-V.3).
 13. Plans, researches, develops, and presents presentations using clear research questions and creative and critical research strategies, individually or as a member of a group (CLAS 28)(NBS-Comm-IA.14; LA11-IV.1; LA12-IV.1-3; CS-IV.3-6).
 14. Uses appropriate telephone techniques to gather and record information (NBS-Comm-IA.16; LA11-IV.2; LA12-IV.1-3; CS-IV.5).
 15. Organizes and leads discussions and uses discussions with peers as a way of understanding information (CLAS 22)(NBS-Comm-IA.19; LA11-IV.3; LA12-IV.2; CS-IV.1, 4, 5, 6).
 16. Uses formal language when making a variety of presentations and uses language persuasively in addressing a particular issue (CLAS 15)(NBS-Comm-IA.26; LA11-IV.1-3; LA12-I.1-1253; CS-IV.1).
 17. Makes well-informed and well-organized presentations with a clear main point, adjusting for message, wording, and delivery to a particular audience and context communicating findings of projects using appropriate graphics, media, and support materials (CLAS 29)(NBS-Comm-IA.30; LA11-IV.1, 3; LA1-IV.1-3; CS-III.2).
 18. Serves effectively as interviewer or interviewee in a variety of situations (e.g., college interview, scholarship interview, job interview) (NBS-Comm-IA.31; LA11-IV.2,3; LA12-IV.1-3; CS-IV.5).

STRAND IV: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of mathematics skills in the development of his/her future role as an employee.*

- D. The student solves mathematical problems, analyzes and interprets data, and applies sound decision-making skills.
 - 1. Uses a variety of computational methods (CMS 7) to solve problems that involve whole numbers, decimals, fractions, percents, and percentages (NBS-Comp-II.1; MA-I.1,14).
 - 2. Uses the simple interest equations ($I = PRT$) to calculate and compare the cash price to the installment price (NBS-Comp-VIE.1, MA-I.3, 12,14).
 - 3. Represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs, and describes the connections among these representations (CMS 6).

STRAND V: LEADERSHIP

CONTENT STANDARD: *The student demonstrates an understanding of the personal qualities that are the basis for developing leadership skills.*

- E. The student identifies and uses leadership skills in a variety of individual and group situations.
 - 1. Assumes leadership roles when participating in school, community and/or volunteer activities (NBS-Comm-IIA.34; CR-5D).
 - 2. Demonstrates team skills in business and school environments (NBS-IIB.4; CR-5D).
 - 3. Practices tact and courtesy in relationships with peers and authority figures (NBS-IIB. 6; CR-5D).

STRAND VI: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

- F. The student develops an awareness of career options and applies job acquisition skills.
 - 1. Recognizes the impact of the global economy on jobs and careers (NBS-CD-IIB.2; CR-5C).
 - 2. Relates career interests to opportunities in the global economy (NBS-CD-IIB.4; CR-1E).
 - 3. Identifies international employment opportunities (NBS-IIB.9; CR-1C).
 - 4. Completes a career portfolio (e.g., letter of application, an employment application, a letter of reference, a résumé, interview tip sheet, and a follow-up letter) (NBS-VB.7, 8; CR-1D).

STRAND VII: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student understands the factors essential to a productive workforce in a culturally diverse global environment.*

- G. The student demonstrates competency by identifying the skills which positively affect productivity.
 - 1. Demonstrates responsible behavior related to employability (e.g., respect for others, communication skills) (NBS-CD-III.2; CR-4A-C).
 - 2. Illustrates how personal qualities transfer from school to the workplace (NBS-CD-II.9; CR-4 A-C).
 - 3. Demonstrates appropriate social skills for the workplace (NBS-III.23; CR-4A, B).
 - 4. Explains and demonstrates appropriate employer and employee interactions (NBS-CD-III.31; CR-4A).
 - 5. Demonstrates the ability to function as a proactive, productive team member in the workplace (NBS-CD-III.36; CR-4B).
 - 6. Discusses the importance of improving skills and learning new ones (NBS-III.1; CR-1E).
 - 7. Develops an action plan to transition from post secondary education to work (NBS-CD-IV.15; CR-1E).

Business Communication and Technology II

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

1. The student signs the district's acceptable use policy. The student then reads a summation of the safety and security policies as well as federal and state laws. The student participates in one of the groups in designing a poster to display in class. The groups are Rules for Safe and Appropriate Conduct on the Internet, Safety Policies on the Internet, Security Policies on the Internet, Federal Laws and Privacy, Privacy Information at Home and at Work.
 - ✓ correct and relevant information on poster
 - ✓ correct spelling, punctuation and grammar
 - ✓ creative design of poster
- 2–7. The student creates an academic career portfolio. Contents to include are résumé, sample work from academic and elective areas and autobiography. The student presents the information on his/her own Web page.
 - ✓ completion of required work
 - ✓ correct use of language and conventions
 - ✓ consistent and correct use of MLA format
 - ✓ completion of Web page expectations
 - ✓ well-organized layout/design
 - ✓ use and placement of graphics
 - ✓ information that is accurate and current
 - ✓ use of navigation and links

STRAND II: FINANCE

CONTENT STANDARD: *The student demonstrates an understanding of financial concepts as they relate to personal financial affairs.*

1. The teacher provides a variety of handouts (e.g., charts, tables) of compensation packages offered by corporations. The student compares and contrasts each package and determines the best package and the worst package. He/She presents the results to the class.
 - ✓ accurate reading and inferring of information from handouts
 - ✓ justification of each compensation package (e.g., the chosen one and the one not chosen)
- 2–3. The student lists short term (in the next 6 months) and long term goals (in the next 10 years). After each goal, the student decides the type of payment that should be used (i.e., cash, credit card or loan). After each payment determination, the student gives a reason why that is the best payment plan. The student shares his/her chart with a small group. After the small group sharing, the student, with the class, de-

termines the best situations to use cash, credit cards, and loans.

- ✓ completion of personal chart
- ✓ correct judgment of a short term goal and a long term goal
- ✓ logical responses to type of payment
- ✓ participation in small group and large group discussions

STRAND III: BUSINESS COMMUNICATION

CONTENT STANDARD: *The student understands communications as applied to personal and professional situations.*

1–9, 13–14, 16–18. The student researches three post secondary education institutions (e.g., colleges, universities, technical schools, training programs) and presents his/her findings to class. Only one in-state institution is allowed out of the three institutions researched. The student interviews (e.g., person to person or over the telephone) one current student or alumni from one of the institutions about his/her experiences. The student presents findings in an informal oral presentation using a display for a visual. Required elements for each institution may include:

- -name of institution
- location of institution
- tuition cost
- -financial aid information
- campus demographics
- career services
- colleges and schools or departments
- program of studies
- advisement
- special programs
- campus life
- academic resources
 - ✓ completion of required components
 - ✓ correct spelling, punctuation, and grammar
 - ✓ consistent and correct use of MLA format
 - ✓ accurate information
 - ✓ appropriate display of information
 - ✓ citations
 - ✓ rough draft and notes
 - ✓ interview questions and responses
 - ✓ oral presentation techniques

10. The student writes to embassy requesting information about study-abroad opportunities.
- ✓ correct spelling and language conventions
 - ✓ appropriate use of protocol
- 11–12. The student listens to other students in a small group format setting when each student presents his/her findings in the post secondary academic research.
- ✓ appropriate active listening skills
 - ✓ respect for speaker during presentation
15. The student plans and chairs a meeting within the class or in an extracurricular situation. The student also delegates the duties to other members of the team, manages the teams, and meets with individual teams throughout the planning process. See STRAND IV: LEADERSHIP, Performance Standards 1–3 Illustration.
- ✓ well-organized meeting
 - ✓ planned and organized discussion format
 - ✓ opportunity for all students to speak

STRAND IV: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of mathematics skills in the development of his/her future role as an employee.*

- 1–3. After completing the research project presented in Strand III Business Communication, the student computes the financial cost (e.g., tuition and fees, books, housing, day-to-day living expenses) for each institution investigated. The student then determines sources of financial aid and the amount given. Finally, on a spreadsheet, the student does a final computation of cost for the number of years needed (e.g., the final cost after four years of college), the compounded interest rate, and the number of years it will take to pay off the debt.
- ✓ correct computation
 - ✓ accurate information on spreadsheet
 - ✓ accurate determination of needs over wants

STRAND V: LEADERSHIP

CONTENT STANDARD: *The student demonstrates an understanding of the personal qualities that are the basis for developing leadership skills.*

- 1–3. The student plans and chairs a meeting within the class or in an extracurricular situation. The student also delegates the duties to other members of the team, manages the teams, and meets with individual teams throughout the planning process. The requirements include:

Chairperson's Meeting Duties:

- manage and meet with planning team(s)
- greet and welcome members
- keep a focus on the topic(s)
- summarize meeting agreements , reports or details
- set time for next meeting

- distribute minutes and reminders before next meeting
- follow up team meetings on decisions or questions

Delegated Tasks for Teams:

- agenda
- refreshments
- room arrangement
- advertising
- record keeping
- greeters
- organization and delegation of teams
- use of parliamentary procedure
- focus on individual topics
- review and distribution of minutes
- follow-up on issues and decisions
- demonstration of leadership skills

STRAND VI: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

- 1–3. The teacher provides a current list of the hottest jobs according to the U.S. Bureau of Labor Statistics. The student picks the three jobs in which he/she has an interest. The student visits a job search engine site (e.g., www.monster.com, www.hotjobs.com) to investigate those jobs on an international level. The student determines a destination, a job interest in that destination, and the skills needed for that job. Then, the student investigates and takes notes on the information found in the various links including opportunities in the public sector and nonprofit, and private sector, how a person finds a job overseas, what kinds of jobs are available, how to apply, and how to move to the location chosen. The student reports back to the class the information gathered by the search.
- ✓ complete notes from each required link
 - ✓ determination of destination and job
 - ✓ necessary skills for the job searched
 - ✓ presentation to class
4. The student responds to a job announcement from a classified ad or Internet job site. Once the job is selected the student prepares the documents to put in a portfolio. The documents include a letter of application, an employment application, a letter of reference, a résumé, an interview tip sheet, and a follow-up letter.

Portfolio

- ✓ accurate completion of required components
- ✓ use of correct style in all documents
- ✓ correct spelling, punctuation, grammar, and word usage
- ✓ consistent and correct use of MLA format
- ✓ inclusion of required information

- ✓ personal signature (where applicable)
- ✓ overall presentation requirements documents
- ✓ overall presentation of portfolio
- Letter of Application
 - ✓ personal letterhead with appropriate graphics
 - ✓ identification of the job
 - ✓ mention of the attached documents (i.e., résumé)
 - ✓ concrete examples when stating personal qualifications for the job
 - ✓ request for a personal interview
- Application
 - ✓ same color ink and type handwriting throughout the application.
 - ✓ no smudges or strikeouts
 - ✓ accurate information
 - ✓ spelling and language conventions
 - ✓ signature on application
- Résumé
 - ✓ name, address, phone number and email address on top and centered
 - ✓ distinct sections of information (i.e., personal information, objectives/goals, education background, work experience, extracurricular or volunteer activities, skills or talents and reference)
 - ✓ spelling and language conventions
- Interview Tip Sheet
 - ✓ legal questions and how to answer them
 - ✓ illegal questions and correct responses to them
 - ✓ discriminatory questions and how to handle them.
- Follow-up Note
 - ✓ standard business letter format
 - ✓ important content in letter (thank you, reminder of when the interview was, confirmation that job is wanted, why the student is the best candidate for the job)

STRAND VII: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student understands the factors essential to a productive workforce in a culturally diverse global environment.*

1–7. The student, individually or with a group, develops a work ethics program for a human resources department for a specific business industry for which he/she has an interest. The student develops a list of 10–15 positive work habits conducive to the needs of the particular business and industry. After each habit the student writes a brief explanation of its intent. An example: Truth: We shall make accurate claims to our customers, use only competent testimonials, and strive to be open about all aspects of the products or services we offer. Finally, the student explains why each habit is important in the workforce and how an employee can achieve it.

A helpful Website that provides information on several business industries is <http://www.iit.edu/departments/csep/PublicWWW/codes/codes.html>.

- ✓ list of appropriate personal qualities and behavior/social skills
- ✓ completion of the components of the list (i.e., the intent of the ethic, why it is important, and how to achieve it)

Entrepreneurship Pathway Standards

Entrepreneurship is a course for the student who is curious about owning a successful company and being his/her own boss. These are only a few of the reasons to explore the possibility of becoming an entrepreneur. The course takes the student on the journey through the entire process of starting one's own business. The student selects a product or service to sell, determines who the customers are, learns how to promote the company, obtains financing, and more. The student also learns how to put together and complete a business plan by the end of the course.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR). The standards are aligned to the National Marketing Education Standards (NMES) and New Mexico Standards for Business Services and Technology (BST).

STRAND I: ENTREPRENEURIAL CHARACTERISTICS

CONTENT STANDARD: *The student identifies unique characteristics of an entrepreneur.*

- A. The student identifies and evaluates entrepreneurial characteristics and the degree to which he/she possesses those characteristics.
 - 1. Identifies one's own personal traits that are typical characteristics of an entrepreneur (CR:1A, 1C).
 - 2. Uses multiple resources and appropriate technologies to identify, collect, and analyze the costs, risks, and benefits of choosing to become an entrepreneur (CSS 3)(CMS 3)(CLAS 8,17,18)(CR: 1B).
 - 3. Uses a variety of media to research and explain insights (CLAS 9) that describes opportunities that lead to the development of successful entrepreneurial endeavors (CR:1B).
 - 4. Applies the steps of the problem-solving process to resolve a business problem (CR:5E), uses multiple resources to gather and evaluate problems (CLAS 8,17,18), and creates responses that offer solutions (CLAS 3,13).

STRAND II: ENTREPRENEURIAL VENTURES

CONTENT STANDARD: *The student develops a marketing and business plan for an entrepreneurial venture incorporating technology.*

- B. The student describes how cultural differences, export/import opportunities, and current trends in a global marketplace can affect an entrepreneurial venture and the student applies economic concepts when making decisions for an entrepreneurial venture.
 - 1. Uses multiple resources to gather and interpret information (CLAS 8, 17, 18), knows the characteristics of a well-designed and well-conducted survey (CMS 17), and analyzes the importance of using research (e.g., surveys, Internet) in marketing decision-making (CR:2C).
 - 2. Designs a new product to meet unfilled consumer wants (CR:1B, 2C) and informs an audience by using a variety of media to explain insight (CLAS 9, 12, 15, 22, 29) in a logical and coherent manner (CLAS 25,28,29).
 - 3. Researches, defines, and gives examples (CLAS 12,15,22,31) of market segmentation, target markets, market share, business location, scarcity, and pricing (CR:1B).
 - 4. Forms and refines a question for investigation (CLAS 1,5,7) to determine potential buyers of specific products at various price levels (CR:2C) and uses an array of media and technologies to present information (CLAS 24,28).
 - 5. Identifies networking opportunities to discuss how networking and competition affect market shares from an informed opinion by providing relevant and convincing reasons (CLAS 12,15,22) incorporating mathematical models (CSS 8) to explain insights (CLAS

- 9,28) in a logical and coherent manner that engages the reader and listener (CLAS 25,29)(CR: 1B, 2A)
6. Creates promotional, publicity, and advertising activities for a given product or service (CR:1B) using relevant and convincing reasons (CLAS 12) and appropriate language conventions (CLAS 15,25).
 7. Informs and explains insights (CLAS 9, 12,15,22,25,27,29) on how a business can contribute to the community (CR:1B, 2A).
 8. Evaluates information, and forms and refines questions (CLAS 1, 5) to develop the major components of a business plan for an entrepreneurial venture (CLAS 7,11,24,31), (CR:1B, 2A).
 9. Identifies and informs an audience (CLAS 9,22,27,28,29) about the importance of gathering and responding to customer feedback and concerns (CR:4B) and supports this information with relevant, convincing, and logically organized evidence (CLAS 12,25) using appropriate language conventions (CLAS 15)
 10. Uses a variety of strategies to respond to information in texts and other media (CLAS 4,6,10,14,21) to investigate cutting-edge developments in marketing (CR:3C).
 11. Evaluates problems, examines cause and effect relationships, and accurately interprets information (CLAS 8,17,24) about marginal costs and marginal benefits (CR:2C).
 12. Explains (CLAS 8, 17, 24) the determinants of supply and demand and how supply and demand markets interact to determine price (CR:1B).
 13. Describes the relationships between private ownership and a market economy (CLAS 9)(CR:1B) using relevant information (CLAS 12,25) and uses appropriate technology tools and language conventions to explain this relationship (CLAS 29, 15, 32).
 14. Uses appropriate language, logic, and technology tools to describe the interrelationships between cost and price (CLAS 12,15,25, 27,29)(CR:1B) .
 15. Uses appropriate methods (CLAS 1,7) and technology tools (CLAS 24) to compute (CMS 7,9) the difference between total revenue and expenses to determine business profit or loss (CR: 2C).
 16. Uses relevant and convincing reasons to simulate a decision to go into a specific business based on opportunity cost (CR:1C, 2C) (CLAS 12,15,25)
 17. Uses appropriate technology tools definitions, and examples, to inform an audience about public goods and services (CLAS 9,27, 28), (CR:1B).
 18. Explains how government plays a role in the market economy (CLAS 9,12,15,22,29) (CR:1B).
 19. Forms and refines a question for investigation (CLAS 1,5) and evaluates information (CLAS 7,11) to define culture and develop an understanding of cultural differences (CLAS 16)(CR:5C) and presents this information using a variety of media (CLAS 24,28).
 20. Uses multiple resources to describe influences of other cultures on American business (CLAS 8,17,18)(CR:1B).
 21. Analyzes information from multiple resources to compare and contrast business practices in different cultures (CLAS 8,13,17,18) (CR:5B).
 22. Analyzes information from multiple resources to describe the concepts of export and import and global economic interdependence (CLAS 8,13,17,18)(CR:1B).
 23. Analyzes information from multiple resources to describe the benefits/risks, trends, and opportunities in international trade (CLAS 8,13,17,18)(CR:1B, 2C).

STRAND III: MANAGEMENT PLANNING

CONTENT STANDARD: *The student develops a management plan for an entrepreneurial venture.*

- C. The student identifies and uses the necessary financial competencies needed by an entrepreneur and identifies and uses appropriate technology and records to make business decisions.

1. Uses multiple resources to gather and evaluate information (CLAS 8,17,18) to determine the resources needed and estimated costs (CMS 1, 2) of producing a given product or service (CR:2A, 2C).
2. Lists common sources for borrowing money for a business and explains and responds reflectively (CLAS 2,4,6) to the advantages and disadvantages of each (CR:1B).
3. Reads critically and independently to draw conclusions (CLAS 14,21) about the differences between debt and equity (CR:1B).
4. Uses cause and effect relationships (CLAS 8) to examine a profit/loss statement and draw conclusions as to whether a business is profitable or not profitable (CMS 18).(CR:2C).
5. Identifies the reasons for keeping high quality business records, manually or electronically, and the possible consequences of not doing so (CLAS 18)(CR:1B).
6. Identifies, completes, and contrasts various types of business records (CLAS 18)(CR:1B, 4C).
7. Uses multiple resources to gather information (CLAS 8) and make personnel and purchasing decisions based on predicted and current sales data using data analysis techniques and summary statistics (CMS18)(CR:2C).
8. Establishes personal short-term and long-term goals and researches (CLAS 24,31) and evaluates information to develop a strategy (CLAS 5,7,11) for attaining these goals (CR:2A, 5A).
9. Identifies characteristics of a good employee in a new business (CR: 4A) and explains how these characteristics exemplify academic and workforce standards.
10. Uses a variety of media to explain (CLAS 9, 12, 15, 25, 27) why friends and family may not be your best employees (CR:4A).
11. Uses multiple resources to research and define those skills and qualities needed for certain jobs and careers (CLAS 8,17,18) (CR:1C, 1E).
12. Forms and refines questions (CLAS 1,11) to assess knowledge and skills within a group and evaluates team performance (CR: 2B, 5A).
13. Demonstrates a high level of effort and perseverance toward goal attainment, both individually and as a team member (CR:2B, 2A).
14. Demonstrates leadership within a group through effective communication (CLAS 9,12,15,22,25,27,28,29), ability to motivate team members, and effective delegation of responsibility (CR:2B, 2D).
15. Explains why motivation, leadership, communication, and trust are important to a team (CR:5A, 5B).

STRAND IV: ETHICS

CONTENT STANDARD: *The student describes how ethics, government, and different forms of business ownership affect the entrepreneurial venture.*

- D. The student distinguishes between ethical and unethical practices in personal and business environments.
 1. Describes a personal code of ethical behavior to an audience (CLAS 9)(CR:4A).
 2. Forms, refines, and defines a question for investigation on ethics and common ethical issues that are encountered by an entrepreneur (CLAS 1,5,7,11,16) (CR:4A, 4D, 4E).
 3. Uses relevant and convincing information to provide an audience with examples of honest and dishonest business practices (CLAS 9,12,15,22,25,27,28,29)(CR:4A).
 4. Synthesizes information (CLAS 6,14,21) to describe (CLAS 19), and respond reflectively to questions (CLAS 2,10) on how government can affect business and business decisions (CR:1B).
 5. Researches (CLAS 5,25), evaluates information (CLAS 7,11,31), and explains (CLAS 1) the rationale for government regulation of businesses (CLAS 16)(CR:1B).
 6. Reads critically and independently to draw conclusions (CLAS 14), explain (CLAS 4,6,19), and give examples (CLAS 2) of the effect

- of tax policy on business (CR:1B).
7. Reads critically and independently to draw conclusions (CLAS 14), explain (CLAS 4,6,19), and give examples of licenses that a business must obtain (CR:4C).
 8. Reads critically and independently to draw conclusions (CLAS 14), explain (CLAS 4,6,19), and give examples of government regulations that affect a business (CR:4B).

Entrepreneurship

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: ENTREPRENEURIAL CHARACTERISTICS

CONTENT STANDARD: *The student identifies unique characteristics of an entrepreneur.*

1. The student reads a handout of the characteristics of successful entrepreneurs (e.g., independent, self-confident, goal-oriented) and determines if entrepreneurship is right for him/her by assessing his/her strengths, weaknesses, interests and aptitudes. He/She can do this by listing strong and weak points on a piece of paper, asking other members of the class what they believe to be his/her strengths and weaknesses, and by taking aptitude tests. The student then submits a written assessment of what he/she discovered about himself/herself.
 - ✓ analysis
 - ✓ personal insights
2. The student considers several appealing businesses and identifies which have the best chance for success by answering the following questions:
 - Is there a market in my community for this kind of business? Will people buy this product or service?
 - How much money would it take to start this business? Will I be able to borrow that much money?
 - How many hours a week is it likely to take to run this business? Am I willing to commit that much time?
 - What are the particular risks associated with this business? What is the rate of business failure?
 - Does my background prepare me to run this kind of business? Do most people who own this kind of business have more experience than I do?
 - How much money could I make running this business?

In a small group, each student discusses the choices considered and explains his/her decisions as to which businesses would or would not succeed.

- ✓ completion of all required components
 - ✓ active participation in discussions
 - ✓ response to questions
3. Using a variety of resources (e.g., books, business trade magazines, business owners), the student examines different business opportunities that were successful and orally presents to the class his/her findings.
 - ✓ support for argument
 - ✓ clarity
 - ✓ resourcefulness
- OR

The student researches (e.g., books, periodicals, Internet) an individual (living or not) who has been nationally successful in operating his/her own business, develops a profile about the person (e.g., Oprah Winfrey, Bill Gates, Levi Strauss), and then answers the following questions:

- Who is the entrepreneur investigated?
- What is the name and nature of the business started?
- What is the history of the entrepreneur (e.g., place of birth, education)?
- What skills, special abilities, and interests did this individual possess that helped to make him/her a successful entrepreneur?
- In your opinion, what personal traits did this person possess that made him/he so successful as an entrepreneur?

The student uses the information to prepare and present a two or three minute report (oral or written) about the individual investigated.

- ✓ all required components
- ✓ analysis
- ✓ effective presentation

4. The student assumes the role of applying for a position in an online business that has opened in his/her community. In his/her preparation for an interview, he/she describes a situation where he/she had to solve a problem, how it was handled, and the results. Also see Strand III, illustration for performance standards #10–15.

STRAND II: ENTREPRENEURIAL VENTURES

CONTENT STANDARD: *The student develops a marketing and business plan for an entrepreneurial venture incorporating technology.*

- 1–4. The student reads about Procter & Gamble's (P&G) history and their products, takes notes, and presents findings to the class. Presentation includes some of P&G's original products, how many products they market today, how many consumers use their products, how many countries sell their products, an example of a product that became obsolete and was discontinued, and why it became obsolete. After the presentation, the student generates discussion around questions (e.g., Which P&G products do you or your family use? What are ways to help P&G improve its products?).

- ✓ analysis
- ✓ facilitation skills
- ✓ relevance of information

1. One way for an entrepreneur to learn how to run a successful business is to go to business experts for help and information. To gain hands-on experience, the student finds the Web site for *Entrepreneur* magazine and finds out what kinds of information this publication and Web site offers to entrepreneurs. The student summarizes his findings and critiques the value of this Web site.

- ✓ analysis

3. In order for the student to identify his/her customers, he/she needs to understand the demographics of his/her market segment because the personal characteristics of the people who purchase or influence the purchase of the product directly affects whether or not they buy the product. The student locates the Web site for *American Demographics* magazine, investigates the kinds of articles the magazine publishes and how this information is helpful to businesses, and uses that information to answer the following questions:

- What is the *American Demographics* Web site address?
- Which issue is featured when this Web site is accessed?
- What is the title and description of one of the featured articles?

- What are the names of the departments for the magazine?
- Name one article listed under “Departments”.
 - What is the Marketing Tools Sourcebook?
 - Name one additional publication of American Demographics.
 - What is the e-mail address for the advertising department?

In a whole or small group setting, the student shares the information found about this web site and then discusses why or why not as a business owner he/she would subscribe to *American Demographics* and how this Web site can be used to better understand his/her customers.

- ✓ completion of tasks
- ✓ individual participation
- ✓ comprehension

- 5,6. The student learns the significance of public relations by reviewing an agency that distributes news releases, accesses one of its current news releases, and analyzes it to determine if it has the following information: release date, does it answer the Who, What, When, Where, and Why questions?, and how the release was organized. The student reports findings and includes additional information about the agency (e.g., contact person for the agency, how the agency was found, the effectiveness of the news release).

- ✓ effective communication
- ✓ relevant information

7. The student researches a company with a strong commitment to social responsibility and presents findings to the class. Information to be imparted to the class includes the company’s product, its mission statement, the relationship between the two, the community action and involvement, and how long this company has been socially involved with the community. Class discussion can center around whether or not this company’s involvement influences the student’s decision to buy its product.

- ✓ completion of task
- ✓ communication skills
- ✓ perspectives

- 8,11,15,16. The student devises a business plan to include the following components: a marketing plan (e.g., advertising and promotion), a management plan (e.g., employees), financial plan (e.g., budgets, loan applications), advantages for developing the plan, and marketing tips, tricks, and traps. Since the activity itself can be detailed and lengthy, the student needs to just sketch an outline of his/her plan. Handouts are provided to facilitate and guide the assignment.

- ✓ inclusion of all required components
- ✓ creativity and ingenuity
- ✓ feasibility

9. See Strand III, Illustration for performance standards 10–15.

10. Part of marketing is being able to develop, promote, and distribute a product. To understand this concept better, the student locates the Web site for the American Marketing Association (AMA), reviews the organization’s information, finds out what resources they offer, and summarizes the information (orally or written) to include the site address, what the association is, a description of its resources, when it was

founded, its mission statement, its three quarterly business publications, what AMA offers at its Information Center, two awards offered by them, how many professional chapters it has, and the address of the AMA professional chapter closest to the student. The student shares the information and engages in a discussion considering how might the AMA be helpful, how the Web site might be used, and the benefits of joining one of its Collegiate Chapters if the student were studying marketing in college.

- ✓ accurate information
- ✓ individual participation
- ✓ insights
- ✓ conceptual understanding of marketing elements

12,13. Customers play an important role in the free enterprise system. They choose which businesses stay in business by buying their products and they determine how much demand there is for any given product. The student investigates a well-known consumer advocacy group, Consumers Union, publisher of *Consumer Reports* to learn how it helps consumers make informed choices. After reading the Web site and gaining information, the student researches one product reviewed by this group, chooses the brand he/she would buy based on this group's recommendation, and presents the research to the class.

- ✓ presentation of information
- ✓ understanding of customer and advocacy group roles
- ✓ research skills

14. The student selects a retailer to interview about how prices are set for the customer and shares the information in a class discussion. Through prepared questions, the student solicits from the retailer how much the business pays for a specific item, the percentage markup, and the customer's price.

- ✓ relevant information

16,19–21. Working side-by side with a variety of people allows an individual to get to know these people personally and professionally, but issues can arise. To better understand diversity training, the student finds out what diversity training is, what it can do, who benefits from this training, the reasons for the training, the advantages and the importance for the training, different ways the training can take place, and the components of these programs. After completion of the study, the student shares the information with the class and generates a discussion to get the other students to thinking about such ideas as which are the most interesting diversity issues, ways to understand diversity, and whether or not diversity issues are easy or difficult to resolve.

- ✓ skills (e.g., research, communication, leadership, critical thinking)
- ✓ relevance of information
- ✓ all required components
- ✓ individual participation

17, 18, 22, 23. The student selects a country to determine its type of government, people, economy, imports, exports, and currency. He/She presents findings to the class with rationale for the selection, what goods, if any, have been purchased from that country, and whether or not the student has personally benefited from international trade with the chosen country.

- ✓ effective presentation
- ✓ accuracy of information
- ✓ rationale

STRAND III: MANAGEMENT PLANNING

CONTENT STANDARD: *The student develops a management plan for an entrepreneurial venture.*

1–6, 8, 9. See Strand II illustration # 8 that addresses creating a business plan.

- ✓ break-even analysis
- ✓ cost of credit analysis
- ✓ IRS regulations for record keeping
- ✓ goals, mission statement, vision statement

7. Many consumers use the Internet for shopping because it is quick, convenient, and provides access to a much larger selection of products than can be found at the mall. The student selects an item, uses the Internet to shop for it, and writes a summary of his experience. Points to include in the written summary: Web site address of the retailer found, what products this retailer sells, the price of three other items the student would like to buy from that retailer, the return policy of the retailer, is a credit card offered, advantages and disadvantages to shopping on the Internet, and a comparison to shopping by catalog.

- ✓ inclusion of all required elements
- ✓ technology skills
- ✓ clarity in communication
- ✓ effective writing elements (e.g., grammar, spelling, punctuation)

10–15. Using the student's experiences, the class discusses and charts various types of conflicts that can arise in a relationship and ways in which people can work through their differences. The student relates those situations to workplace scenario to see if they transfer to coworker to coworker, company to vendor, and company to company. With those ideas implanted in his/her head, the student pursues further examination of the ideas through research (e.g., articles, Web sites) to validate or change the opinions formulated. The class reconvenes to test and compare their original ideas with what was learned. Discussion centers around similarities and differences found, techniques used that were successful or not, and how one might resolve differently a future conflict.

- ✓ brainstorming skills
- ✓ individual participation
- ✓ conflict resolution techniques
- ✓ effective communication
- ✓ team work and leadership skills

Extension: The student, working in small groups, writes a 5-10 minute skit that demonstrates conflict management, performs the skit in front of the class, and then analyzes and suggests how well the conflict was resolved.

STRAND IV: ETHICS

CONTENT STANDARD: *The student describes how ethics, government, and different forms of business ownership affect the entrepreneurial venture.*

1–3. The student assumes the role of "troubleshooter" at a work site. He/She identifies three examples of ethical work habits and three examples of unethical work habits observed at the work site and reports findings to a small group of students in the class.

- ✓ recognition of ethical practices
- ✓ presentation

4,5,8. The student reads an article in a current newspaper or magazine about government regulations of business and answers the following questions:

- What is the situation presented in the article?
- What industry is involved?
- What regulatory agency is involved and why?
- What regulations are being violated?
- Who is the regulatory agency protecting?
- How does the business/industry defend its position?
- How does the government defend its position?
- What is your reaction to the claims?
- How would you solve this situation?
 - ✓ understanding of government regulations
 - ✓ responses to all questions
 - ✓ insights

6,7. The student reviews the business plan that has been written in Strand II, illustration for performance standard # 8 and checks to see that the plan meets legal restrictions and regulations, licensing requirements, and provisions for tax policies that may impact and affect the business. The student researches the New Mexico Tax and Revenue site and gets information on the regulations and license forms required by the state for businesses.

- ✓ relevant information

Record Keeping Pathway Standards

Record Keeping focuses on the importance of keeping accurate records in both the personal and business areas. The student examines personal finance through budgeting, banking and credit record keeping. In addition, the student explores career opportunities in the field of record keeping. The use of technology is integrated throughout the course.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the National Standards for Business (NBS), the Albuquerque Public Schools Mathematics Standards (MA), and the State of New Mexico Career Readiness Standards (CR).

STRAND I: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

- A. The student uses mathematical procedures to analyze and solve business problems.
 - 1. Determines the correct mathematical processes for various problems and uses formulas when appropriate (CMS 1,7,9)(NBS–Comp–I.1; MA–I.1,2).
 - 2. Selects and uses appropriate tools when solving problems (NBS–Comp–I.2; MA–I.1,2) and generates representations to model specific numerical relationships (CMS 5).
 - 3. Generates an algebraic sentence to model real-life situations (CMS 8) and communicates understanding of problems through oral and written means (NBS–Comp–I.8; MA–I.4).
 - 4. Understands the differences between various methods of data collection (CMS 15), completes, and uses a variety of computational methods (CMS 1,7) to compute necessary data for a variety of business slips (e. g., sales slips, purchase orders, invoices, time cards) (NBS–Comp–I.1; MA–I.1).

STRAND II: FINANCE BUDGETING

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to personal financial affairs.*

- B. The student develops and evaluates a spending/savings plan.
 - 1. Uses a variety of techniques for researching topics including summarizing, cross referencing, and use of interactive technologies (CLAS 5) to identify ways in which individuals and families obtain financial resources (NBS–PF–III.3).
 - 2. Evaluates information, explanations, or ideas of others (CLAS 7) to categorize expenses as fixed or variable (NBS–PF–II.17).
 - 3. Represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs (CMS 6) to explain the impact of taxes on personal financial planning (NBS–PF–III.4).
 - 4. Uses language persuasively (CLAS 15) to describe why and how people save (NBS–PF–III.4).
 - 5. Synthesizes and organizes information from a variety of sources (CLAS 19) to examine the role of saving and investing in creating a financial plan (NBS–PF–IV.14).
 - 6. Constructs and uses a personal spending/savings plan and evaluates it according to short- and long-term goals (NBS–PF–II.3).

7. Generates an algebraic sentence to model (CMS 8) and describe how income and spending patterns change throughout the life cycle (NBS–PF–III.8).
8. Develops financial goals for the future based on one's lifestyle expectations and career choices (NBS–PF–IV.15).
9. Uses a variety of computational methods (CMS 1,7) to construct, use, and evaluate a budget (NBS–PF–II.3).

STRAND III: FINANCE BANKING

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to personal financial affairs.*

- C. The student evaluates services provided by financial deposit institutions.
 1. Identifies the rights and responsibilities associated with using a checking account (NBS–PF–VI.3).
 2. Develops a presentation by using clear research questions and creative and critical research strategies (CLAS 28) to describe the steps involved in opening and using a checking account (NBS–PF–VI.4).
 3. Makes a well-informed and well-organized presentations with a clear main point, adjusting the message, wording, and delivery to a particular audience (CLAS 29) that compares and contrasts the different types of checking accounts offered by various financial deposit institutions (NBS–PF–VI.5).
 4. Accurately interprets information presented in a technical format (CLAS 18) to compare electronic means of transfer (e.g., debit cards, ATM, and automatic deposits/payments) offered by various financial deposit institutions (NBS–PF–VI.6).
 5. Recognizes the costs associated with services offered by financial deposit institutions (e.g., overdrafts and stop payment orders) (NBS–PF–VI.9).
 6. Discusses the advantages and disadvantages of e-banking (NBS–PF–VI.12) and analyzes the interrelationship between science and technology (CSS 6).
 7. Describes and uses a variety of computational methods (CMS 1,7) to understand the steps involved in the bank reconciliation process (NBS–PF–VI.10).

STRAND IV: FINANCE — CREDIT

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to personal financial affairs.*

- D. The student analyzes factors that affect the choice of credit and the cost of credit.
 1. Uses appropriate technologies to collect and analyze data (CSS 3) that explains when and why borrowing is used for the purchase of goods and services (NBS–PF–VII.1).
 2. Reads critically and independently (CLAS 21) to identify methods of establishing and maintaining a good credit rating (NBS–PF–VII.3).
 3. Solves formulas for specified variables (CMS 9) to determine advantages and disadvantages of credit (NBS–PF–VII.4).
 4. Demonstrates an understanding of the relationship between ratios, proportions, and percents (CMS 4) in defining interest as a cost of credit and explains why it is charged (NBS–PF–VII.5).
 5. Generates an algebraic sentence (CMS 8) to explain why the amount of principal, the period of the loan, and the interest rate affect the amount of interest charged (NBS–PF–VII.7).
 6. Compares and contrasts the various aspects of credit cards (e.g., APR, grace period, incentive buying, methods of calculating interest, fees) (NBS–PF–VII.11) and creates multiple displays of this data to analyze and explain relationships (CSS 7).
 7. Interprets a credit card statement (NBS–PF–VII.17).

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies career preparation and employability skills required for employment and professional growth in the field of business occupations.*

- E. The student identifies career options and describes and applies employability skills.
 - 1. Examines texts for arguments and develops informed opinions (CLAS 11) to identify skills required for a career in a record keeping or related field (NBS–CR–I.11; CR–4A).
 - 2. Develops career goals (NBS–CR–I.11; CR–1A).
 - 3. Accurately interprets information from and detects inconsistencies in a variety of informational and technical texts (CLAS 17) to explore and report on employment opportunities in record keeping (NBS–CR–IIIB.11; CR–1D).
 - 4. Reads critically and independently to draw conclusions from research (CLAS 21) that explain the impact of accurate record keeping in various arenas (e.g., business, personal) (NBS–CR–IVC. 2, 3; CR–1E).
 - 5. Develops a personal code of ethical behavior (NBS–CR–IIIA.1; CR–4A, D).

STRAND VI: TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to achieve goals and produce products.*

- F. The student uses appropriate technology to input, organize, and retrieve information.
 - 1. Develops proper input techniques (i.e., keyboarding, scanning, use of touch screen or mouse) including safety methods to avoid repetitive strain injury (NBS–IT–VII.1; CR–3B).
 - 2. Enters and manipulates numeric data using the touch method on a 10-key keypad (NBS–IT–VII.1; CR–3B).
 - 3. Creates files and organizes them according to rules of filing for easy retrieval (NBS–IT–VII.1; CR–3B, D).
 - 4. Uses research procedures appropriate to type of information, and nature of query (NBS–IT–VII.6; CR–3D).
 - 5. Enters, sorts, and retrieves information from databases (NBS–IT–VII.4; CR–3B).

Record Keeping

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

- 1–4. Given a set of ten time cards with the time in and time out stamped on each, the student calculates the hours worked each day and the total hours for the week, including overtime. The student then transfers the information to a payroll register and calculates total earnings, taxes, total deductions and net pay.
- ✓ use of correct computation tools
 - ✓ correct calculations
 - ✓ accurate information on forms
- 1–4. The student participates in a group activity of 3–5 students. He/She draws a problem from a set of scenario cards (i.e., customer cash sales, customer charge sales, purchase order, receiving cash from customer, returned item). After solving the problem, the student takes turns with the other members of the group to present the solution to the problem including explaining the problem and how it was solved. Each member evaluates the presentation.
- ✓ correct calculations
 - ✓ appropriate group participation in all activities
 - ✓ coherent presentation
 - ✓ correct design and completion of business forms

STRAND II: FINANCE BUDGETING

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to personal financial affairs.*

- 1–9. The student selects a job/career interest. He/She researches the salary at an entry level. Using the entry level salary, the student computes federal and state taxes and deducts them from the gross salary to determine the net pay. Once the net pay is determined, he/she first lists expected fixed expenses, a monetary amount for each and totals the expenses and then the variable expenses, a monetary amount for each and totals the expenses. The student constructs a budget using the expense figures and then transfers the figures to a pie graph. The student presents and displays his/her budget and graph to the class. After the completion of student presentations, the student participates in a full class discussion.

Discussion Questions:

- Besides a job, what are other ways to obtain financial resources?
- How much money did you allocate for savings? Why did you decide to save? If you did not allocate for savings, why not?
- How much money did you allocate for investments? What is the difference between savings and investments? Give examples of each.

- Look ten years down the line. What will be the differences in your budget compared to the current one?
- What financial goals do you have now? In ten years, what will your financial goals be?
 - ✓ correct computations
 - ✓ correct graph construction
 - ✓ correct budget construction
 - ✓ presentation techniques
 - ✓ appropriate active participation skills
 - ✓ thoughtful responses to discussion questions

STRAND III: FINANCE BANKING

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to personal financial affairs.*

- 1-6. The student presents (e.g., PowerPoint) on one aspect of banking. Topics include: rights and responsibilities of using a checking account, steps involving opening and using a checking account, banking services and how to use them, check writing tips, advantages and disadvantages of banking, how banks do business and consumer protection and banking.
- ✓ accurate information
 - ✓ information sources citation
 - ✓ understanding of topic

PowerPoint Presentation

- ✓ delivery of presentation (e.g., timing, organization)
- ✓ easily read fonts
- ✓ point size variations appropriate for headings and text
- ✓ variety of layouts that are aesthetically pleasing
- ✓ graphics, sound, and/or animation that assist in presenting an overall theme
- ✓ no errors in grammar, capitalization, punctuation, and spelling

7. The student follows this scenario. Your monthly bank statement has arrived in the mail along with the canceled checks. List the steps you use to reconcile your bank statement. Using your canceled checks as well as your check register, prepare a bank reconciliation statement. (The teacher provides the necessary materials needed for this activity.)
- ✓ listing and following the correct steps
 - ✓ creation of appropriate bank reconciliation statement
 - ✓ correct calculations

STRAND IV: FINANCE — CREDIT

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to personal financial affairs.*

- 1–6. The student participates in a whole class brainstorming session on what the students want. The wants are listed and next to each the monetary cost. Next to each want the student determines how each should be purchased (e.g., cash, credit or loan). In small discussion groups, the student helps choose the five common wants the group desires and how each should be purchased—cash, credit or loan. If the

student choice is credit or loan, he/she determines the period of the credit or loan payments, the total amount of interest paid (the percentage rate determined by the teacher), and the total cost of the purchase (interest payments plus the original cost of the item). The student presents findings to the class.

Discussion questions:

- When should cash be used? When is it advantageous to use credit? When shouldn't it be used?
- Why is interest charged?
- How does a person establish and then maintain good credit?
 - ✓ appropriate group participation
 - ✓ thoughtful responses to questions

7. Given a credit card statement, the student interprets the information by developing a variety of questions to be asked of another student. The student pairs up with another student and each person takes turns asking and responding to the questions.
 - ✓ relevant questions
 - ✓ correct responses

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies career preparation and employability skills required for employment and professional growth in the field of business occupations.*

- 1–4. The student conducts an interest /aptitude survey and uses the results by circling job want ads related to the record keeping field. The student then participates in groups of 2–3 students with similar interests to select a career path to explore. The group presents its findings to the class.
 - ✓ individual participation in activities
 - ✓ use of technology, visuals
 - ✓ clarity and completeness of report
 - ✓ effective delivery of report
 - ✓ collaboration
5. The student prepares a poster to be presented to the class giving examples of appropriate ethical behavior in various situations (e.g., personal, business).
 - ✓ appropriate examples
 - ✓ neatness/organization of poster
 - ✓ understanding of the concept of ethics
 - ✓ application of ethical behavior in situations

STRAND VI: TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to achieve goals and produce products.*

1–3. The student creates a variety of documents, both written and numeric, files them, and retrieves them.

- ✓ correct input method
- ✓ accuracy
- ✓ ease of retrieval

1–5. The student, with the class, creates a database of favorite movies using categories (e.g., genre, common titles, actors and actress, locations, years). The student completes research on his/her movies selected based on the categories. He/She selects five of his/her favorite movies and inputs them in the class's database. Once the entire database is completed, the student completes a variety of sorting and retrieval activities (e.g., duplication of titles, list of movies from specific categories, actors in the movies).

- ✓ correct sorts
- ✓ retrieval capability

Career Development Pathway Standards

In **Career Development** the student uses interest inventories and computer software to explore available career opportunities and to link personal interests with related career fields. The student examines basic job search skills including contacting employers, writing for a variety of purposes, practicing interviewing skills, and learning to manage money. An emphasis is placed on developing appropriate skills necessary for success in the workforce.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the National Standards for Business (NSB), State of New Mexico Career Readiness Standards (CR), and APS Language Arts Standards (LA).

STRAND I: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment professional growth, and employment transitions in the field of business occupations.*

- A. The student researches career options, applies job acquisition skills, and prepared job search documentation.
 - 1. Identifies, assesses and analyzes personal talents, values, skills and interests as they may relate to a future career based on the completion of standardized career interest and personality indicator assessments (NBS-CD-IA.6; CR-1A).
 - 2. Use multiple resources to gather information to critically and independently draw conclusions (CLAS 7,8,14,15) about career goals, skills, and interests to the selection of high school courses (NBS-CD-IVA.7; CR-E).
 - 3. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection (CLAS 4) to develop an awareness of various jobs and careers (NBS-CD-VIA.1; CR-1C).
 - 4. Evaluates several occupation interests, including career clusters, and uses multiple resources for projecting career opportunities and trend (NB-CD-IIA.9, A.10; CR-1B).
 - 5. Creates and implements a career plan that includes the required steps to transition from high school to post-secondary education/training or the workplace (NBS-CD-IVC.3; CR-1C).
 - 6. Discusses the importance of job leads and informal personal network in conducting a job search and identifies and demonstrates ways to find appropriate jobs, including the use and development of the personal network (NBS-Comm-IVA.6, A.8; CR-1D).
 - 7. Synthesizes and organizes information (CLAS 19) to develop a career portfolio (e.g., résumé, letter of application, letters of recommendation, examples of work and technical skills, awards, documentation of extracurricular activities, community service activities, and copies of unofficial transcripts) (NBS-CD-VB.9; CR-1E).
 - 8. Synthesizes and organizes information from a variety of sources (CLAS 19) to identify steps to prepare for job interviews (e.g., appropriate dress, significance of nonverbal communication (NBS-CD-IVA.14; CR-1D).
 - 9. Forms and refines questions for investigation (CLAS 1) to prepare appropriate interview questions and responses (NBS-CD-IVA.13, 15; CR-1D).
 - 10. Reads critically and independently to draw conclusions (CLAS 14), accurately interpret (CLAS 17) and discuss illegal and discriminatory interview questions (NBS-CD-IVA.26; CR-1D).

STRAND II: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- B. The student identifies and demonstrates the skills that positively affect productivity.
 - 1. Synthesizes and organizes information from a variety of sources in order to inform (CLAS 19) and explain the importance of workplace expectations (e.g., dress code, attendance, personal appearance and grooming) (NBS-CD-IIIB.6; VC.3; CR-4A).
 - 2. Discusses the impact of time management practices on one's personal and professional image (NBS-Comm-II.A19; CR-2A).
 - 3. Develops skills to give and receive constructive criticism (NBS-CD-IIID.7; CR-4A, 4B, 4C).
 - 4. Defines, discusses, and informs an audience using a variety of media to explain insights (CLAS 9) on how office politics and relationships have an impact on the workplace (NBS-Comm-VB.2-4, 6-7: CR-4A-C).
 - 5. Demonstrates appropriate techniques for resigning from a position (NBS-CD-VIB.4; CR-4A, 4C).

STRAND III: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

- C. The student develops, locates, summarizes, organizes synthesizes, and evaluates information for problem solving, writing, and research.
 - 1. Uses online databases, online sources, and other information sources (e.g., CD-ROMs, videos) to access and retrieve information (CLAS 5)(NBS IT-V.11; CR-3B, 3D) and reads critically and independently to draw conclusions from this information (CLAS 14).
 - 2. Uses search procedures appropriate to type of information, nature of source, and nature of query (NBS-IT-VII.7; CR-3B, 3D).
 - 3. Makes a well-informed and well-organized presentation with a clear main point, adjusting the message, wording, and delivery (CLAS 29) on the impact of information technology on all careers (NBS-IT-XVII.2; CR-3A).
 - 4. Uses an array of media and technologies to examine and comprehend information (CLAS 24)(NBS-IT-VII.9).
 - 5. Evaluates the influence of technology on society (CSS 9) and analyzes the interrelationship between science and technology (CSS 6).

STRAND IV: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- D. The student demonstrates communication skills critical for the acquiring, interpreting, evaluating, and managing information.
 - 1. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas, supporting details (CLAS 4), and synthesizing a variety of types of visual information including picture and symbols (CLAS 6) for reports and presentations (NBS-Comm-IB.19; LA12-IC.1).
 - 2. Demonstrates control of grammar, paragraph and sentence structure, diction, and syntax (CLAS 20) in all informal and formal writing for a variety of purposes (NBS-Comm-IC.11; LA11-IIB.2).
 - 3. Proofreads documents to ensure correct grammar, spelling, and punctuation (NBS-Comm-IC.11; LA11-IIB.1).
 - 4. Documents properly both print and electronic sources to avoid plagiarism (NBS-Comm-IC.13; LA10-IIB.1).

STRAND V: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

- E. The student solves mathematical problems, analyzes and interprets data, and applies sound decision making skills.
 - 1. Uses a variety of computational methods to estimate quantities involving real numbers (CMS 1), selects and uses appropriate forms of rational numbers to solve real-world problems, including those that involve proportional relationships (CMS 2) and solves formulas for specified variables (CMS 9)(NBS-Comp-I.1; MA-I.1).
 - 2. Understands the differences between the various methods of data collection (CMS 15) and uses a variety of technology tools (CLAS 29) to prepare a budget (NBS-Comp-VID.2; MA-I.12).
 - 2. Uses a variety of technology tools (CLAS 29) to reconcile and maintain a bank statement with a check register (NBS-Comp-VID.3; MA-I.12) and compares and draws conclusions between two or more sets of univariate data using basic data analysis techniques and summary statistics (CMS 18).

Career Development Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment professional growth, and employment transitions in the field of business occupations.*

1. The student uses *Choices* computer program to complete the interest inventory, and analyzes the results, comparing how closely the results match his/her interests.
 - ✓ completion of inventory
 - ✓ printed copy for portfolio
 - ✓ logical analysis
- 2,5. The student creates a 10-year career plan. The topics and questions are:

Education and Training

- What classes do you need to take to complete your high school diploma? Do you need to enroll in summer school or night school?
- When do you need to take the ACT?
- When do you need to apply for college?
- What are your childcare plans while you are in college?

Money

- When, where, and how are you going to start applying for financial aid?
- Do you need to get a part-time job to start saving for college?

Work Experience

- Do you plan on working a summer job?
- What part-time jobs have you held?
- What are your childcare plans when you work?

After the student responds to the questions, he/she puts the information in a table. The columns are Year, Goal, Begin by, and Complete by. The student fills in each year starting with the current year and then fills in the information about the plan in the other columns. The student presents his/her plan to the class.

- ✓ thoughtful responses to questions
- ✓ completion of chart
- ✓ correct spelling and language conventions
- ✓ correct format of chart
- ✓ presentation techniques

3–5. The student identifies five job choices. The student visits the America's Career Infonet Website (www.acinet.org). Using the five jobs selected, the student researches and analyzes each job using the following criteria:

- Job Description
- Education/Training
- New Mexico Salary
- Average National Salary
- Job Outlook/Trends

The student determines the best choice and the worst choice and discusses them with other students utilizing a small group format.

- ✓ complete and accurate research information
- ✓ group participation as presenter and listener
- ✓ justification for best choice and worst choice
- ✓ correct spelling and language conventions
- ✓ use of technology
- ✓ analysis

6. The student views "Getting A Job" and pays particular attention to job networking. The student develops a list of jobs in which he/she is interested. He/She develops a spreadsheet with the following columns: Job Interest, Name of Contact, Name of Company, Address of Company and Phone Number. (If the student cannot name a contact, he/she needs to investigate a name by asking peers or adults who may provide a name. If no name is provided, the student makes a call to a company that provides employment in that job area and requests a contact name). Once the student has all the job contacts, he/she arranges an interview with at least two of the people to discuss aspects of the job (e.g., education and training, job duties, pay, outlook).

- ✓ list of jobs
- ✓ accurate information on job contacts
- ✓ correct spelling of information
- ✓ interview questions and answers
- ✓ analysis of information from interviews

7–10. The student responds to a job announcement from a classified ad or Internet job site. Once the job is selected the student prepares the documents to put in a portfolio. The documents include letter of application, three letters of reference, a résumé, and an interview tip sheet.

Portfolio

- ✓ accurate completion of required components
- ✓ correct style in all documents
- ✓ correct spelling, punctuation, grammar, and word usage
- ✓ inclusion of required information
- ✓ personal signature (where applicable)
- ✓ overall presentation of requirements documents
- ✓ overall presentation of portfolio

Letter of Application

- ✓ personal letterhead with appropriate graphics

- ✓ identification of the job applied for
- ✓ mention of the attached documents (i.e., résumé)
- ✓ concrete examples when stating the reason(s) you qualify for the job
- ✓ request for a personal interview

Résumé

- ✓ name, address, phone number and email address on top and centered
- ✓ distinct sections of information (i.e., personal information, objectives/goals, education background, work experience, extracurricular or volunteer activities, skills or talents and references)
- ✓ correct use of spelling and language conventions

Interview Tip Sheet

- ✓ legal questions and how to answer them
- ✓ illegal questions and correct responses to them
- ✓ discriminatory questions and how to handle them-in a panel discussion, each group presents its findings

STRAND II: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- 1–3. The student participates in a variety of class discussions. The first involves listing personal qualities that are necessary to maintain in the workplace. The second discussion involves responsible behavior related to employability. Using information from each discussion, the class creates a checklist. A checklist is then developed into log form that the student maintains over a period of time. Once the task is completed, the student writes a report on his/her strengths and weakness providing strategies to maintain the strengths and strategies to improve the weaknesses. The information is shared in a third discussion group using a small group format. The student participates in a constructive suggestion session after each student's presentation to provide other strategies to maintain strengths and improve on weaknesses.
 - ✓ completion of log
 - ✓ participation in all discussion groups
 - ✓ correct use of constructive suggestions
 - ✓ reflective report on strengths, weakness, and strategies
 - ✓ ability to listen openly to other students' suggestions
- 3–4. The student reads, discusses, and/or role plays a variety of workplace scenarios involving colleagues of various status hierarchies (e.g., nepotism, office romance, seniority vs. merit, office politics). The student identifies the problem, how the parties involved can constructively and destructively deal with the problem, how to best respond to the situation and suggests ways to resolve the problem.
 - ✓ correct identification and analysis of the problem
 - ✓ sound resolutions
 - ✓ discussion techniques (e.g., participates, takes turns, listens to others)
5. The student creates a list of reasons an employee leaves his/her job (e.g., education, financial need, better opportunity with another employer, personal problem). In small groups, the student compares his/her list with the other members, and devises a final list of five reasons. The group composes a letter for each reason, using the appropriate business letter format.

- ✓ formal business letter form
- ✓ effective date of resignation
- ✓ explanation for resignation
- ✓ brief mention of the positive aspects of working for the current employee
- ✓ concluding statement that leaves the door open for the future
- ✓ correct spelling and language conventions

STRAND III: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology, and other tools to improve learning, achieve goals, and produce products and presentations.*

- 1–4. The student researches a chosen career using career search engines (e.g., www.bls.gov, www.bpa.org, www.jobweb.com) and job search engines (e.g., www.jobweb.com, www.monster.com). When researching for the career, the student responds to the following questions:
- a. What are the education and training requirements?
 - b. In what career interest area is this career located?
 - c. What are the national earnings?
 - d. What is the nation employment outlook?
 - e. Where are the jobs located for this career?
 - f. What is the New Mexico employment outlook?
 - g. What is the earning potential in New Mexico?
 - h. What are the job duties and activities?
 - i. What are the physical demands?
 - j. What are the work hours and travel requirements?
 - k. What aptitudes are needed?
 - l. What type of temperament is best for this career?
 - m. What high school class is taken to prepare for this job?

The student reflects on the responses and produces a formal report on the questions by organizing the questions into formal topic sections (e.g., Education and Training, New Mexico Employment Outlook, Physical Demands).

- ✓ complete responses for each question
- ✓ accurate information
- ✓ analysis of information in responses
- ✓ formation of topic sections
- ✓ spelling and language conventions
- ✓ MLA format
- ✓ work-cited page

STRAND IV: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- 1–4 The student researches a chosen career using career search engines (e.g., www.bls.gov, www.bpa.org, www.jobweb.com) and job search engines (e.g., www.jobweb.com, www.careerbuilder.com, www.monster.com). When researching for the career, the student responds to the

following questions:

- a. What are the education and training requirements?
- b. In what interest area is this career located?
- c. What are the national earnings?
- d. What is the national employment outlook?
- e. Where are the jobs located for this career?
- f. What is the New Mexico employment outlook?
- g. What is the earning potential in New Mexico?
- h. What are the job duties and activities?
- i. What are the physical demands?
- j. What are the work hours and travel requirements?
- k. What aptitudes are needed?
- l. What type of temperament is best for this career?
- m. What high school class should be taken to prepare for this job?

The student reflects on the responses and produces a formal report on the questions by organizing the questions into formal topic sections (e.g., Education and Training, New Mexico Employment Outlook, Physical Demands).

- ✓ complete responses for each question
- ✓ accurate information
- ✓ analysis of information in responses
- ✓ formation of topic sections
- ✓ spelling and language conventions
- ✓ MLA format
- ✓ work cited page

STRAND V: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

- 1–3. The student creates and maintains a budget for one month. First the student makes a realistic determination on how much he/she can earn per hour on a job he/she can currently find. In a brainstorming session, the student lists fixed expenses (i.e., utilities, food, transportation, car loan, savings, health, car insurance and entertainment). Throughout the month the teacher provides emergency situations in which the student rearranges his/her budget to meet the emergency expenses. Using a teacher-provided packet of checks and a register, the student maintains a checkbook to be used to pay for the expenses. After the budget timeframe, the student determines the total expenses in the budget and determines the success or failure of the month-long budget. The student, with a partner, discusses the budget and determines strategies to maintain the successes or improve on the failures.

- ✓ correct computations
- ✓ completion of each component of project
- ✓ suitable budget design
- ✓ accurate depiction of information on pie graph
- ✓ insights

Fundamentals of Marketing

Pathway Standards

Fundamentals of Marketing is an introductory course that explores the processes of marketing and the channels the products/services take from the producer to the consumer. The student studies basic economic and marketing concepts. Areas of study are Career Readiness, Marketing Strategies and the Free Market Economy.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), National Retail Skill Standards (NRSS), and the National Marketing Education Standards (NMES).

STRAND I: CAREER READINESS

CONTENT STANDARD: *The student explores the role of marketing in a global economy.*

- A. The student identifies the roles of marketing and analyzes the impact of marketing on the individual, business, and society; creates multiple displays of data to analyze and explain relationships in scientific investigations (CSS 7); uses the four basic operations of mathematics with linear expressions (CMS 10); and defines, develops, and applies a code of ethics to various marketing issues.
 - 1. Forms and refines a question to investigate and identify skills required for a career in marketing (CLAS 1)(CR-1A).
 - 2. Uses a variety of techniques to research careers in marketing and uses data about different marketing careers (CLAS 8)(CMS 3) to better understand career opportunities (C-1A, 1C).
 - 3. Develops career goals in marketing (CR-1A, 1C) and presents these goals by using appropriate language, reason, and organizational structure (CLAS 26).
 - 4. Uses an array of media and technologies to examine and comprehend information (CLAS 24) about opportunities for employment in marketing (CR-1B).
 - 5. Describes the essential components of an investigation, including appropriate methodologies (CSS 1), to research, define, and describe the marketing concept (CR-1A-E; NMES-BA:003, EC:005).
 - 6. Identifies how science has produced knowledge that is relevant to individual health and material prosperity (CSS 10) and explains the impact of marketing on personal life (CR-1A-E; NMES-BA:003).
 - 7. Accurately interprets information from and detects inconsistencies in a variety of informational and technical texts (CLAS 17) to explain the diversity of activities involved in marketing (CR-1A-E; NMES-BA:003, BA:004, EC:004).
 - 8. Uses appropriate technologies to collect, analyze (CSS 3), and describe how and why different cultures have different ethical systems (CR-4A-E).
 - 9. Examines texts for arguments to develop an informed opinion (CLAS 11) about a personal code of ethical behavior (CR-4A-E; NMES-PD:008).

STRAND II: MARKETING STRATEGIES

CONTENT STANDARD: *The student describes the characteristics of product, price, place, and promotion in the marketing process.*

- B. The student explains the roles and strategies for implementing each of the elements of the marketing mix; identifies and applies measurement techniques; and considers possible effects of measurement errors (CSS 4).
 - 1. Names and explains the common elements of a typical product package, their various functions, and importance (NMES-PM:017,

- PR:001).
2. Uses a variety of techniques for researching and classifying (CLAS 5) products in industrial or consumer categories (NMES-EC:002).
3. Evaluates the information, explanations, or ideas of others by identifying clear, reasonable, criteria (CLAS 7) to differentiate between generic and brand name products and identifies the qualities of an effective brand name (NMES-PM:021).
4. Uses appropriate technologies to collect, identify, and analyze (CSS 3) factors that influence a product's price (NMES-PM:021, PI:001, PI:002, PI:005, PI:006) and demonstrates an understanding of ratios, proportions, and percents (CMS 4) in explaining these factors.
5. Identifies various pricing policies and the situations in which each is applicable (NMES-PM:021, PI:001, PI:002, PI:005, PI:006) and makes an informed and organized formal presentation with a clear main point, adjusting the message, wording, and delivery to a particular audience and context (CLAS 32) on this topic.
6. Differentiates among the various channels of distribution and explains their importance to the marketing process (NMES-DS:005, BA:004, BA:003, DS:001).
7. Identifies the major components of a physical distribution system and examines texts for arguments (CLAS 11) to differentiate between which distribution system best serves its market and synthesizes and organizes this information to inform and persuade and audience (CLAS 19)(NMES-DS:001, BA:004, DS:055).
8. Identifies the various forms, mediums, and activities of promotion and uses language persuasively in addressing an issue (CLAS 15)(NMES-PR:001, PR:007, PR:002, SE:017, SE:048; NRSS 1.1.1, 1.1.3, 1.2.2, 1.2.7, 1.2.8, 2.1.1, 2.1.4, 2.1.5, 2.2.1, 2.3.1).
9. Creates and uses criteria to evaluate (CLAS 13) and explain the importance of personal selling (NMES-SE:874, SE:810, SE:024, SE:001, SE:057, SE:811, SE:042, SE:017, SE:061, SE:883, SE:893, SE:873, SE:895; NRSS-1.1.1, 1.1.3, 1.2.2, 1.2.7, 1.2.8, 2.1.1, 2.1.4, 2.1.5, 2.2.1, 2.3.1).
10. Uses language persuasively (CLAS 15) to demonstrate the steps involved in the selling process (NMES - SE:048).
11. Reads critically and independently (CLAS 21) to differentiate between rational and emotional buying motives (NMES-SE:883).

STRAND III: FREE MARKET ECONOMY

CONTENT STANDARD: *The student identifies the characteristics of a free market economy.*

- C. The student identifies numerous marketing variables and strategies in dealing with a diversified marketplace; identifies and explains how external factors influence/dictate marketing decisions; and uses mathematical models to describe, explain, and predict this phenomena (CSS 8).
 1. Creates multiple displays of data to analyze, compare, and contrast existing products/services (CSS 7)(CMS 15)(NMES-EC:012, EC:002, IM:001) and presents information appropriate for the purpose and audience (CLAS 29).
 2. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas and supporting details (CLAS 4) to explain why the characteristics of a given product/service have a competitive edge (NMES-EC:012, EC:002, IM:001).
 3. Reads critically and independently (CLAS 21) to identify specific government regulations and the governmental agencies creating them (NMES-EC:012, EC:008, FI:019, EC:009, EC:001, BA:028).
 4. Identifies current technological advances affecting marketing strategy (NMES-IM:194, IM:001, IM:010, EC:013).
 5. Evaluates the influence of technology on society (CSS 9) to explain the importance of having a technological edge over competition (NMES-EC:012, IM:194, IM:001, IM:010).

Fundamentals of Marketing

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: CAREER READINESS

CONTENT STANDARD: *The student explores the role of marketing in a global economy.*

- 1–4. Each student brainstorms a list of personal interests and abilities, circles the types that apply to marketing-related careers, and shares results during a class discussion. He/She then forms a group with other students who have similar interests and narrows choices to one career to explore. Each group presents its findings to the class using visual aids. The student takes notes during other group presentations and uses these to write a personal reflection about marketing-related careers.
- ✓ individual participation
 - ✓ variety of resources
 - ✓ use of technology, visuals
 - ✓ clarity and completeness of presentation
 - ✓ appropriate language conventions
 - ✓ effective delivery of presentation
 - ✓ appropriate behavior during presentation
- 5–9. Each student creates a collage/poster entitled. “Marketing and Me”. The poster must illustrate how marketing impacts his/her life and his/her personal code of ethics. Each student presents the collage/poster to the class and explains how marketing has improved/impacted his/her standard of living.
- ✓ individual participation
 - ✓ variety of resources
 - ✓ creativity/originality
 - ✓ knowledge of the marketing concept
 - ✓ effective delivery of presentation
 - ✓ understanding of ethical behavior

STRAND II: MARKETING STRATEGIES

CONTENT STANDARD: *The student describes the characteristics of product, price, place, and promotion in the marketing process.*

- 1–11. The student, working alone or in small groups, develops an original/unique product/service (with instructor approval of product/service) and applies the “Four Ps” (i.e., product, price, place, promotion) of the marketing mix to that product/service. Each student/group presents the product/service to the class using an illustration or prototype of the product/service. The presentation includes: production plan, pricing strategies, distribution plan, and promotion plan. Each element must include examples of marketing activities.
- ✓ all required components
 - ✓ examples of marketing activities for each of the Four Ps

- ✓ individual participation
- ✓ creativity/originality
- ✓ knowledge of the Four Ps
- ✓ effective delivery of presentation
- ✓ realistic application of the Four Ps

STRAND III: FREE MARKET ECONOMY

CONTENT STANDARD: *The student identifies the characteristics of a free market economy.*

- 1–5. The student, working alone or in small groups, selects and researches (e.g., Internet, library) a country and that country's economic system. Each student/group presents the country and economic system to the class using multi-media illustrations and examples. The presentation includes: country's history; language and location; political, monetary, and economic systems; technological advancements and their advantages, and why and how the economic system works for the country.
 - ✓ all required components
 - ✓ technology
 - ✓ individual participation
 - ✓ creativity/originality
 - ✓ effective delivery of presentation
 - ✓ understanding of concepts

Business Management Pathway Standards

Business Management is an instructional program that prepares individuals to undertake management of an existing enterprise, which includes franchise operations. Emphasis is given to management, social responsibilities, legal requirements, and risks involved in the conduct of a private enterprise. The formal study of management is an increasingly critical area of importance in business with emphasis in analyzing, synthesizing and evaluating data to make decisions for the business. Areas of study are career readiness, general management, human resources development, economics, and legal issues and ethics.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), and the National Marketing Education Standards (NMES).

STRAND I: CAREER READINESS

CONTENT STANDARD: *The student explores the role of business management in a global economy.*

- A. The student develops and implements a business plan in a controlled environment (e.g., student works with a school-based enterprise vendor).
 1. Forms and refines questions that define long-term and short-term planning (CLAS 1)(NMES-PD:018, PD:019; CR-2A, 5A).
 2. Selects a specific event and identifies long-term and short-term planning activities (NMES-PD:018, PD:019; CR-2A).
 3. Reads critically and independently (CLAS 14) to identify the major components of a business plan (NMES-PD:018, PD:019; CR-1C).
 4. Synthesizes and organizes information from a variety of sources (CLAS 19) to describe the use of a business plan (NMES-PD:018, PD:019).
 5. Collects, organizes, and synthesizes information from a variety of sources (CLAS 19)(CSS 3) to prepare a business plan (NMES-PD:018, PD:019).
 6. Develops a plan for a specific business (NMES-PD:018, PD:019; CR-1C).
 7. Works with professional consultants in preparing a business plan (NMES-PD:018, PD:019; CR-2A, 2B, 5D).
 8. Prepares a timetable for establishing a planned business (NMES-PD:018, PD:019; CR-2A).
 9. Evaluates information, explanations, and ideas of others to identify criteria to (CLAS &) assess qualifications to start a new business (NMES-BA:028, EC:009, EC:011, EC:012, BA:052).
 10. Compares and draws conclusions between two or more sets of univariate data using basic data analysis techniques and summary statistics (CMS 18) to examine potential business opportunities in relation to personal preferences, financial worthiness, and perceived risk (NMES-BA:028, EC:009, EC:011, EC:012, BA:052; CR-1B).
 11. Examines texts for arguments and develops an informed opinion to (CLAS 11) contrast the advantages and disadvantages of managing an existing business (NMES-BA:028, EC:009, EC:011, EC:012, BA:052).
 12. Accurately interprets information presented in a technical format (CLAS 18) to identify potential problems facing a planned business (NMES-BA:028, EC:009, EC:011, EC:012, BA:052).
 13. Synthesizes and organizes information from a variety of sources (CLAS 19) to develop contingency plans for solving identified problems (NMES-BA:028, EC:009, EC:011, EC:012, BA:052).

STRAND II: GENERAL MANAGEMENT**CONTENT STANDARD: *The student identifies and describes management principles.***

- B. The student compares and contrasts the basic tenets of management theories and explains why they are important.
1. Reads critically and independently to draw conclusions (CLAS 21) and identify target markets for businesses (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006).
 2. Uses an array of media and technologies (CLAS 24) to access primary and secondary data sources on potential target markets (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-1D).
 3. Develops a customer profile for the business and policies and procedures for serving customers (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-1D, 5C, 5E).
 4. Uses a variety of computational methods to estimate and (CMS 1) plan the layout and facilities needed for a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-1D) and uses a variety of technology tools to present the plan (CLAS 27).
 5. Synthesizes and organizes information from a variety of sources (CLAS 19) and selects and uses appropriate forms of rational numbers (CMS 2) to calculate the costs of renovating or improving a site for a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-1D, 2C, 3D).
 6. Designs and conducts a scientific investigation to select and determine appropriate channels of distribution to reach a target market that includes: testable hypothesis, controls and variables, methods to collect, analyze, and interpret data, results that address hypothesis being investigated, predictions based on results, re-evaluation of hypothesis, additional experimentation as necessary, and error analysis (CSS 2)(NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006).
 7. Creates and uses criteria to evaluate (CLAS 13) the effectiveness of promotional efforts (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006).
 8. Uses appropriate technologies to collect and analyze data (CSS 3) to modify marketing plans based on customer feedback (CLAS 7)(NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-5E, 5F).

STRAND III: HUMAN RESOURCE DEVELOPMENT**CONTENT STANDARD: *The student examines the effective management of personnel.***

- C. The student defines, develops and applies a plan for the management of human resources to meet the needs and current trends in business.
1. Establishes goals and objectives for a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-2A, 5A)
 2. Evaluates the information, explanations, or ideas of others by identifying clear, reasonable criteria (CLAS 7) to plan for personnel needs and determines the types of employees needed (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-2A, 2B, 5B, 5C).
 3. Uses appropriate technologies to diagram the organizational structure of a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-5F).
 4. Uses appropriate grammar conventions (CLAS 20) to write job descriptions for positions in a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-5D).
 5. Synthesizes and organizes information from a variety of sources (CLAS 19) to develop a training program for new employees (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-5A, 5B, 5C).
 6. Uses a variety of techniques to research (CLAS 5) and create an appropriate compensation plan for a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-2A).

7. Develops a list of personnel policies for obtaining and maintaining employment in a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-1D, 2A, 2B, 4A, 4B, 4C, 5D).
8. Outlines procedures for handling employee suggestions and complaints (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-5D, 5E) and uses a variety of technologies to present this information (CLAS 27) in a well-informed and well-organized formal presentation with a clear main point (CLAS 29).
9. Responds reflectively (CLAS 2) and demonstrates effective leadership and motivation techniques in small group situations (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-4B, 5A, 5D, 5E).
10. Establishes control practices and procedures for a business (NMES-IM:196, IM:194, DS:055, PR:003, PR:001, PR:010, IS:006; CR-4C, 4D, 4E, 5E).

STRAND IV: ECONOMICS

CONTENT STANDARD: *The student explains and applies the concepts of economics, finance, and accounting needed in the management of a business.*

- D. The student identifies and uses essential financial/accounting competencies to make sound business decisions.
 1. Evaluates information, explanations, and ideas of others (CLAS 7) to define key economic concepts and uses a variety of technology tools to give examples of key economic concepts (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, EC:010, EC:008).
 2. Informs an audience by using a variety of media to research and (CLAS 9) explain the importance of opportunity costs when making a decision (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, EC:010, EC:008).
 3. Uses language persuasively (CLAS 15) to describe the relationship between private ownership and a market economy (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, EC:008).
 4. Expresses an informed opinion that clearly states a personal view, is logical and coherent, and engages the listener or reader (CLAS 25) when defining how a market economy resolves the problems of what, how, and for whom to produce (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, EC:010, EC:008).
 5. Reads critically and independently to draw conclusions (CLAS 14) and explain the determinants of supply and demand and explains how supply and demand markets interact to determine price (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, BA:014, EC:010, PI:001, PI:005, PI:002, PI:006, BA:024, EC:008).
 6. Accurately interprets information presented in a technical format (CLAS 18) to explain the effect of different market structures on market price (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, BA:014, EC:010, PI:001, PI:005, PI:002, PI:006, BA:024, EC:008) and represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs to describe the connection among these representations (CMS 6,18).
 7. Describes the difference between fixed and variable costs and explains the role of variable costs on pricing (NMES-BA:014, PI:001, PI:005, PI:002, PI:006, BA:024).
 8. Explains how market prices ration goods and services and provides an incentive to produce goods and services (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, BA:014, EC:010, PI:001, PI:005, PI:002, PI:006, BA:024, EC:008) and creates and uses criteria to evaluate the effectiveness of the presentation (CLAS 13).
 9. Establishes prices of identified products and creates multiple displays of these data to analyze and explain relationships (CSS 7) (NMES-BA:014, PI:001, PI:005, PI:002, PI:006, BA:024).
 10. Establishes a profit goal for the business (NMES-BA:014, PI:001, PI:005, PI:002, PI:006, BA:024).
 11. Synthesizes and organizes information from a variety of sources (CLAS 19) to identify the role of government assistance in the

- growth and development of small businesses (NMES-EC:003, EC:009, EC:001, EC:005, EC:006, EC:007, BA:014, EC:010, PI:001, PI:005, PI:002, PI:006, BA:024, EC:008).
12. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas and supporting details (CLAS 4) to understand the resources and costs needed to produce a given product (NMES-EC:002, EC:003, EC:006) and selects and uses appropriate forms of rational numbers to solve real-world problems including those that involve proportional relationships (CMS 2).
 13. Uses mathematical models to describe, explain, determine, and predict (CSS 8) costs and necessary requirements needed for a given business (NMES-EC:002, EC:003, EC:006).
 14. Identifies ongoing operational expenses and projects the total cash needed for the business (NMES-BA:024, MN:016, B:016, BA:020) by estimating the rate of change in the context of the problem (CMS 14).
 15. Identifies the major sources of funding for a business (NMES-BA:024, BA:016, BA:020) and informs and explains these insights to an audience (CLAS 9).
 16. Uses multiple resources to gather information, evaluate (CLAS 8), compare, and draw conclusions between two or more sets of univariate data (CMS 18) to describe the trade-off between debt and equity financing (NMES-BA:024, BA:016, BA:020).
 17. Prepares a loan application (NMES-BA:024, BA:016, BA:020).
 18. Analyzes for decision-making purposes the financial health, worth and cash flow of a business (NMES-BA:024, MN:016, BA:016, BA:020).
 19. Determines when financial experts should be consulted for the interpretation of financial data (NMES-BA:024, MN:016, BA:016, BA:020).
 20. Uses a variety of computational methods (CMS 1) to determine the number of products to be sold to make a profit (break-even analysis) and generates an algebraic sentence to model this situation (CMS 8)(NMES-BA:024, MN:016, BA:016, BA:020).
 21. Applies appropriate techniques and considers possible effects of measurement errors (CSS 4) when identifying factors which cause changes in the financial picture of a business (NMES-BA:024, MN:016, BA:016, BA:020).
 22. Describes the resulting consequences to a business of specific problems relating to keeping poor quality business records (NMES-BA:023, BA:024, BA:016).
 23. Understands the difference between various methods of data collection (CMS 15) and identifies essential records needed for the day-to-day operation of a business (NMES-BA:023, BA:022, BA:024, BA:016, BA:020).
 24. Accurately interprets information presented in a technical format (CLAS 18) to explain the relationship of record keeping and tax reporting (NMES-BA:023, BA:022, BA:024, BA:016, BA:020).
 25. Prepares an opening-day and one-year pro form financial statements for a business (NMES-BA:024, BA:020).
 26. Forecasts personnel and purchase decisions based on sales data and estimates the rate of change in the context of the problem (CMS 14)(NMES-BA:22, BA:024, BA:016, IM:001, IM:003, IM:009, BA:005).

STRAND V: LEGAL ISSUES AND ETHICS

CONTENT STANDARD: *The student identifies and discusses ethical and legal considerations in business.*

- E. The student describes how ethics, government, and different forms of business ownership affect the business venture.
 1. Uses a variety of techniques for researching topics, including summarizing and cross referencing (CLAS 5), to identify the difference between a sole proprietorship, a partnership, a franchise, and a corporation (NMES-BA:028, EC:009).
 2. Uses discussions with peers as a way of understanding information (CLAS 22) when describing special types of business ownership (e.g., franchise) (NMES-BA:028, EC:009).

3. Reads critically and independently (CLAS 21) to analyze the interrelationship between science and technology when determining needs for protecting ideas and inventions (NMES-PM:021, EC:009, PD:008, PD:006, IS:001).
4. Analyzes the impact of governmental regulations affecting a business (NMES-BA:028, EC:009, EC:008, IS:001).
5. Uses discussions with peers (CLAS 22) to analyze and describe examples of honest and dishonest business practices (NMES-PD:008, PD:006, IS:001).
6. Uses language persuasively (CLAS 15) to define ethics and develops a presentation that uses clear research questions and critical research strategies (CLAS 28) to explain common ethical issues that are encountered by a business manager (NMES-PD:008, PD:006, IS:001).
7. Describes and demonstrates a personal code of ethical behavior (NMES-PD:008, PD:006, IS:001).
8. Identifies strategies that address and improve ethical behavior in a business (NMES-PD:008, PD:006, IS:001).
9. Examines texts for arguments and develops an informed opinion (CLAS 11) to compare and contrast business practices in different cultures (NMES-EC:016, EC:007).
10. Analyzes necessary modifications to American business practices to facilitate interaction in the global marketplace (NMES-EC:016, EC:007).
11. Explains the effect that government regulations have on international trade (NMES-EC:016, EC:007).
12. Identifies requirements facing small businesses considering exporting (NMES-EC:016, EC:007).
13. Analyzes arguments, concepts, and perspectives presented in literary works and in the media (CLAS 31) to discuss current trends and identify opportunities in the global marketplace and predict future impact on American businesses (NMES-EC:016, EC:007).

Business Management

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: CAREER READINESS

CONTENT STANDARD: *The student explores the role of business management in a global economy.*

- 1,2. The student learns that planning is part of the management process of using organizational resources effectively and efficiently to achieve organizational goals. Working in small groups, the student brainstorms what planning is and why it is necessary. After consensus is reached, the student writes both short and long term goals he/she needs to achieve his/her “dream” career.
 - ✓ individual participation in group discussion
 - ✓ reasonable goals
 - ✓ effective communication
- 3–8. The student devises a business plan to include the following components: a marketing plan (e.g., advertising and promotion), a management plan (e.g., employees), financial plan (e.g., budgets, loan applications), advantages for developing the plan, and marketing tips, tricks, and traps. Since the activity itself can be detailed and lengthy, the student needs to just sketch an outline of his/her plan. (The student provides handouts to facilitate and guide the assignment).
 - ✓ inclusion of all required components
 - ✓ creativity and ingenuity
 - ✓ feasibility
9. The student reads a handout of the characteristics of successful entrepreneurs (e.g., independent, self-confident, goal-oriented) and determines if entrepreneurship is right for him/her by assessing his/her strengths, weaknesses, interests and aptitudes. He/She can do this by listing strong and weak points on a piece of paper, asking other members of the class what they believe to be his/her strengths and weaknesses, and by taking aptitude tests. The student then submits a written assessment of what he/she discovered about himself/herself.
 - ✓ analysis
 - ✓ personal insights
- 10–13. The student considers several appealing businesses and identifies which have the best chance for success by answering the following questions:
 - Is there a market in my community for this kind of business? Will people buy this product or service?
 - How much money would it take to start this business? Will I be able to borrow that much money?
 - How many hours a week is it likely to take to run this business? Am I willing to commit that much time?
 - What are the particular risks associated with this business? What is the rate of business failure?
 - Does my background prepare me to run this kind of business? Do most people who own this kind of business have more experience than I do?
 - How much money could I make running this business?

In a small group, each student discusses the choices considered and explains his/her decisions as to which businesses would or would not succeed.

- ✓ completion of all required components
- ✓ to questions

OR

The student assumes the role of applying for a position in an online business that has opened in his/her community. In his/her preparation for an interview, he/she describes a situation where he/she had to solve a problem, how it was handled, and the results.

STRAND II: GENERAL MANAGEMENT

CONTENT STANDARD: *The student identifies and describes management principles.*

1–8. The student creates a marketing plan following the DECA Guide. The plan includes the following events: Fashion Merchandising Promotion Plan, Entrepreneurship Participating Event, Entrepreneurship Written Event, E-Commerce Business Plan Event, Advertising Campaign Event Technical Marketing Representative Event and the Marketing Research Events. The student follows the deadline dates and submits a final copy of the project.

- ✓ adherence to deadlines/due dates
- ✓ adherence to guidelines
- ✓ quality of project
- ✓ creativity within guidelines
- ✓ marketing research
- ✓ originality
- ✓ documentation of sources

STRAND III: HUMAN RESOURCE DEVELOPMENT

CONTENT STANDARD: *The student examines the effective management of personnel.*

1–10. The student, working alone or in a small group, invents a fictional company. He/She assumes the role of the owner and creates a human resources plan that includes recruitment and selection, employee training, conflict resolution, compensation, promotion, benefits, incentives, transition, termination, evaluation, legislation that has changed the workplace, and labor relations. Each student or team presents the plan to the class and a discussion follows on the merits or deficiencies of the plan. At a later date, the student or team submits a revised plan.

- ✓ required components
- ✓ effective communication
- ✓ impressive presentation
- ✓ revisions
- ✓ feasibility and reasonableness of plan
- ✓ individual participation

STRAND IV: ECONOMICS

CONTENT STANDARD: *The student explains and applies the concepts of economics, finance, and accounting needed in the management of a business.*

1. The student reviews a variety of business transactions and decides if the transaction amounts are or are not included in the calculation of

gross domestic product (GDP). (Note: $GDP = C + I + G + F$).

C = personal consumption expenditures

I = gross private domestic investment

G = government purchases of goods and services

F = net exports of goods and services

✓ understanding of concepts

✓ accurate determinations

2,4–6,9–11. The student demonstrates the interaction of supply and demand in the workplace by participating in the “In the Chips” simulation developed by the Foundation for Teaching Economics (website <http://www.fte.org/teachers/lessons>). The student acts as a buyer or a seller and experiences the competitive nature of markets. As a result, he/she sees how competition influences the price of goods and the decisions of buyers and sellers in the marketplace.

✓ comprehension of supply and demand concepts

3–5,7,10. Customers play an important role in the free enterprise system. They choose which businesses stay in business by buying their products and they determine how much demand there is for any given product. The student investigates a well-known consumer advocacy group, Consumers Union publisher of Consumer Reports to learn how it helps consumers make informed choices. After reading the Web site and gaining information, the student researches one product reviewed by this group, chooses the brand he/she would buy based on this group’s recommendation, and presents the research to the class.

✓ presentation of information

✓ understanding of customer and advocacy group roles

✓ research skills

8, 20. The student creates a fictional company and assumes the role of owner and prepares for the class a presentation about his/her company to include:

A. description of the major goods and/or services sold by the company

B. the type of business ownership selected and why?

C. a minimum of three of the company’s direct competitors,

D. five characteristics of a successful owner that he/she possesses with an explanation on how these traits benefit his/her business, and

E. an explanation of how the company competes with specific examples.

✓ completion of all required components

✓ research skills

✓ organization

✓ effective delivery of presentation

✓ problem-solving skills

12–19,23–25. The student devises a business plan to include the following components: a marketing plan (e.g., advertising and promotion), a management plan (e.g., employees), financial plan (e.g., budgets, loan applications), advantages for developing the plan, and marketing tips, tricks, and traps. Since the activity itself can be detailed and lengthy, the student needs to just sketch an outline of his/her plan. (The student provides handouts to facilitate and guide the assignment).

- ✓ inclusion of all required components
- ✓ creativity and ingenuity
- ✓ feasibility

21, 22, 26. The student competes individually or as a team in the Junior Achievement Titan Computer Simulation game. An aspect of the game is that the student gets a feel for running his/her own business, makes financial decisions, and sees that what he/she does affects everyone else. The student maintains records, completes reports, and does an analysis of the business practices being simulated. At the end of the game, the student writes a summary of what he/she learned.

- ✓ effective communication
- ✓ completion of all required tasks
- ✓ insights

STRAND V: LEGAL ISSUES AND ETHICS

CONTENT STANDARD: *The student identifies and discusses ethical and legal considerations in business.*

1–4. The student, working in a small group, charts the forms of business ownership illustrating advantages and disadvantages of each. After small group activity, the whole class compares and contrasts the different forms of business ownership and creates a new chart to encompass all of the different ideas.

- ✓ identification of business ownership forms
- ✓ individual participation
- ✓ analysis
- ✓ presentation
- ✓ active listening
- ✓ creativity and originality

5–12. The student researches legal and ethical concerns for an assigned case study (e.g., Enron), formulates his/her own conclusion(s) about the best course of action for that case study and presents his/her findings to the class. After each student has presented, the class selects three case studies to discuss in greater detail.

- ✓ ethical issues
- ✓ research skills
- ✓ organization
- ✓ logical conclusions
- ✓ presentation
- ✓ active listening
- ✓ individual participation
- ✓ quality of end product

13. The student brainstorms and creates a set of criteria to evaluate a franchise opportunity. The class discusses the merits of the criteria and determines a rating for the franchise venture.

- ✓ adherence to criteria
- ✓ identification of current trends
- ✓ discussion

Marketing Lab I

Pathway Standards

In **Marketing Lab I** the student is introduced to marketing skills in a hands-on school-based enterprises (SBE) environment. The student develops and practices skills necessary for employment in a controlled learning situation. Areas of study are financial measures, facilities and equipment management, marketing functions, and career readiness.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR) and the School Based Enterprise Operational Guide (SBE).

STRAND I: FINANCIAL MEASURES

CONTENT STANDARD: *The student explores the financial planning involved in a school-based enterprise (SBE).*

- A. The student A) uses a variety of computational methods to estimate quantities involving real numbers (CMS 1); B) uses the four basic operations (CMS 10, 7); C) and selects and uses appropriate forms of rational numbers to solve real-world problems (CMS 2); D) generates algebraic sentences to model real-life situations (CMS 8); E) solves formulas for specific variables (CMS 9); F) calculates the percentage increase and decrease in a quantity (CMS 13); G) develops a viable accounting system to obtain a financial overview of the store (e.g., balance sheet, inventory, deposits); and H) demonstrates a positive cash flow.
 - 1. Uses an array of media and technologies to examine, accurately comprehend information (CLAS 25, 27) and use information to consider possible effects of errors (CSS 4) when counting and verifying the cash drawer at the end of shift (CLAS 25)(NS–MA:388; CR–1D; WorkKeys).
 - 2. Reads critically to understand (CLAS 14), graph information (CMS 12), and identify and apply appropriate measurement techniques (CSS 4) from an X tape (SBE–X; WorkKeys).
 - 3. Graphs (CMS 12) a loss report for unsold, perishable merchandise (SBE–X) and considers possible effects of measurement errors (CSS 4).
 - 4. Takes a physical inventory and uses multiple resources to gather information to evaluate problems, examines cause and effect relationships, (CLAS 8)(SBE–VII), and graph the information (CMS 12)(CSS 4, 5) from a physical inventory.
 - 5. Makes correct change utilizing appropriate computation methods (CMS 7)(NS–MA:386; CR–1D; WorkKeys).

STRAND II: FACILITIES AND EQUIPMENT MANAGEMENT

CONTENT STANDARD: *The student identifies and applies requirements and regulations for operation and maintenance of facilities and equipment in a school based enterprise (SBE).*

- B. The student A) adheres to local and state requirements for store operation (e.g., health and fire codes, sales license) and B) utilizes and maintains facilities and equipment in the SBE.
 - 1. Uses an array of media and technologies to examine and comprehend information (CLAS 25) and uses a variety of tools to present information appropriate for the purpose and audience (CLAS 29).
 - 2. Operates all pertinent equipment (e.g., cash register, cookie oven, ice machine) (SBE–IX), uses a variety of computational methods to estimate quantities (CMS 1) using the four basic operations (CMS 10), and evaluates the influence of other modern technologies on society (CSS 9).

3. Reads critically and independently (CLAS 14) to research and define (CLAS 16) environmental health department codes (SBE-XIII; WorkKeys) and uses language persuasively to address health code issues (CLAS 15)(CSS 1) and identifies how science has produced knowledge that is relevant to individual health (CSS 10).
4. Reads critically and independently (CLAS 14) to research (CLAS 16) and identify ADA accessibility guidelines and regulations (SBE-XIII; WorkKeys) and uses appropriate language to describe these guidelines and regulations (CLAS 15).
5. Describes and demonstrates appropriate methodologies, proper equipment, and safety precautions and practices (e.g., OSHA guidelines) (CSS 1, 10)(SBE-XIII).
6. Accurately interprets information presented in a technical format (CLAS 18) to understand, describe, and abide by fire drills, evacuation, and lock down procedures (CSS 1)(SBE-XIII).

STRAND III: MARKETING FUNCTIONS

CONTENT STANDARD: *The student understands the functions of marketing in relationship to a SBE.*

- C. The student describes the characteristics of product, price, place, and promotion in the SBE, develops an appropriate strategy using a variety of data from surveys, samplings, estimations, and inferences to address specific problems (CMS 3), and generates appropriate algebraic sentences to model real-life situations (CMS 8).
 1. Knows the characteristics of a well-designed survey (CMS 17), understands the differences between the various methods of data collection (CMS 15), effectively uses a variety of interactive technologies (CLAS 23, 25), accurately interprets information (CLAS 24)(CSS 3), and utilizes a variety of promotional activities to appeal to target markets (SBE-XI).
 2. Uses a variety of computation methods to estimate quantities (CMS 1, 2, 7, 10), solves formulas for specific variables (CMS 9), calculates the percentage increase and decrease (CMS 13), and estimates the range of change in the context of a problem (CMS 14) to Identify product sold, location of each product, and price (SBE-XI); and creates multiple displays of this data (CLAS 8, 10) (CSS 3,7).
 3. Forms, refines, and uses mathematical models (CSS 8) to respond to questions (CLAS 1, 12) on ways the SBE competes with price and non-price factors (SBE-V).
 4. Uses a variety of computation methods and strategies (CMS 1, 2, 7,9,10) and considers possible effects of measurement errors (CSS 4) when receiving and verifying incoming orders (SBE-VI)/

STRAND IV: CUSTOMER SERVICE

CONTENT STANDARD: *The student explores the role of the SBE in the school and community.*

- D. The student applies general business practices to the SBE operation (e.g., store training, safety practice, customer service).
 1. Forms and refines questions for investigation (CLAS 1), develops an appropriate strategy using a variety of data from surveys, samplings, estimations, and inferences (CMS 3, 17), responds reflectively (CLAS 2), and creates responses that evaluate problems and offers solutions (CLAS 3) to explore the role of customer service (SBE-VIII).
 2. Uses appropriate grammar, paragraph structure, and sentence structure (CLAS 20), uses discussions with peers as a way of understanding information (CLAS 22), and uses a variety of technologies (CLAS 29) to document student work in SBE (e.g., hours, activities, jobs held) (SBE-XIII; WorkKeys).
 3. Develops a presentation that articulates a logical and coherent (CLAS 26) self-evaluation of job performance (SBE-XIII; WorkKeys) using appropriate language conventions (CLAS 27) and mathematical representations (CMS 13, 15, 17).
 4. Accurately interprets information (CLAS 17) in a technical format (CLAS 18) and synthesizes and organizes information from a variety of print and electronic sources (CLAS 19, 25) to understand merchandise features and benefits (SBE-IV).

5. Uses an array of media and technologies to examine, comprehend information (CLAS 25), and acquires a working knowledge of the selling process (SBE-XII)
6. Synthesizes a variety of visual information (CLAS 6), including mathematical models (CSS 8), to identify the customer's buying motive and evaluates the ideas of others (CLAS 7) (SBE-IV, VIII, XII) to express an informed opinion that clearly states the customer's view (CLAS 26).
7. Forms and refines questions for investigation (CLAS 1) of problems and offers solutions (CLAS 3) to develop businesslike procedures and attitudes (SBE-XII; WorkKeys).

Marketing Lab I

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: FINANCIAL MEASURES

CONTENT STANDARD: *The student explores the financial planning involved in a school-based enterprise (SBE).*

- 1, 2. The student, at the end of his/her shift reconciles the cash register drawer to the X-tape. To verify the amount of cash in the drawer the student counts, each denomination of coin and currency, records each amount on a verification slip, places coins in proper cash drawer compartments, straightens currency so that it is not crumpled, totals the change fund accurately, and indicates whether the change fund balanced.
 - ✓ completion of all procedures
 - ✓ accuracy
3. The student fills out the required form on perishable items on a daily basis.
 - ✓ accuracy
 - ✓ completion of task
4. The student takes a physical inventory and completes spreadsheets with all products listed. This can be extended for both wholesale and retail products.
 - ✓ participation in the inventory procedure
 - ✓ completion of forms
 - ✓ accuracy
5. In most transactions the student has to make change. In a majority of those cases the student works with a change indicator. In making the change, the student announces the amount of sale and the amount of cash tendered to the customer, places the cash on the register plate, counts back the change due to the customer, and thanks the customer. (Note: The student also learns to make change without a change indicator.)
 - ✓ correct procedures
 - ✓ customer courtesy
 - ✓ poise and confidence
6. The student creates a data base on the list of vendors the store uses. It may be necessary for the student to use the telephone to get some of the information he/she needs.
 - ✓ thoroughness
 - ✓ accuracy
 - ✓ telephone procedures (e.g., taking messages, transferring calls)
 - ✓ communication skills

STRAND II: FACILITIES AND EQUIPMENT MANAGEMENT

CONTENT STANDARD: *The student identifies and applies requirements and regulations for operation and maintenance of facilities and equipment in a SBE.*

1. On a daily basis, the student performs basic safety checks of all equipment. If he/she finds that any piece of equipment is not functional, he/she reports the condition to a supervisor to assure that the item is repaired in a timely manner.
 - ✓ daily inspections
 - ✓ reporting procedures
 - ✓ attention to detail
- 2 – 4. The student views videos and reads about safety standards to learn the proper procedures for operating and handling food service. The student participates in class discussion to talk about the “dos and don’ts” of safety practices.
 - ✓ comprehension
 - ✓ consistent practice of rules, guidelines, and codes
4. As part of a daily routine that the student employs, he/she checks for frayed cords, trash in the proper area, dangerous spills, and other situations that could be considered unsafe. He/She either takes care of the problem or calls in someone to handle the situation.
 - ✓ recognition of problem areas
 - ✓ attention to detail
 - ✓ problem solving
5. Through monthly required drills, the student follows proper procedures for fire drills, evacuation, and lock down exercises. The student uses the required exit, reports to the proper location, and secures any item for which he/she is responsible.
 - ✓ compliance
 - ✓ responsible behaviors

STRAND III: MARKETING FUNCTIONS

CONTENT STANDARD: *The student understands the functions of marketing in relationship to a SBE.*

1. The student creates a sign or poster to promote a new product or to increase sales of a current product.
 - ✓ creativity
 - ✓ appeal
2. The student participates in the layout of the store and lists products with possible location and price.
 - ✓ individual participation
 - ✓ accuracy
3. The student creates a list of prices that the SBE would pay if it went to a full retail outlet and examines the savings.
 - ✓ comparisons
 - ✓ analysis
4. The student checks incoming orders to ensure accuracy, price extension, and damaged goods.
 - ✓ documentation
 - ✓ accuracy

STRAND IV: CUSTOMER SERVICE

CONTENT STANDARD: *The student explores the role of the SBE in the school and community.*

1. Using the Learning Activity packet (LAP) HR: 32, the student reads the section on the customer service mind set, answers questions, and takes a test over the material. The student engages in class discussion to ensure comprehension and to process relevant information.
 - ✓ acquisition of key concepts
 - ✓ individual participation
 - ✓ communication skills
- 2, 7. Each student is assigned special duties either on a rotating or regular basis. He/She checks off duties as they are completed and verifies the time worked.
 - ✓ fulfillment of duties
 - ✓ proper documentation
 - ✓ appropriate behaviors
3. On a regular basis, the student performs a self-evaluation of his/her performance. This can be done in a written format or in a conference with his/her site supervisor/teacher. He/She refers to duties to be performed, how well he/she thinks he/she has performed or carried out his responsibilities, and suggestions for improvement. Clarifying and probing questions can help guide this process (e.g., Did you keep things well stocked? How did you handle the situation when you ran out of items?).
 - ✓ insights
 - ✓ recommendations
- 4–6. Each student in a SBE is required to be involved in some way in the selling function. When he/she takes a role as a sales associate, a working knowledge of the selling process is crucial in creating sales for the business. This helps sales associates to be effective in providing personalized customer service. The student writes a description of the selling process that takes place in his/her store to include product knowledge, customer approach, customer needs and wants, and presentation.
 - ✓ writing conventions
 - ✓ effective communication
 - ✓ all required components
 - ✓ understanding of the selling process

Marketing Lab II

Pathway Standards

In **Marketing Lab II** the student has the opportunity to demonstrate employability skills in a hands-on school-based enterprise (SBE) environment. The student practices supervising peers in a controlled learning situation. Areas of study are financial measures, facilities and equipment management, marketing functions, and career readiness.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), and the SBE Operational Guide (SBE).

STRAND I: FINANCIAL MEASURES

CONTENT STANDARD: *The student explores the financial planning involved in a school-based enterprise (SBE).*

- A. The student A) develops a viable accounting system to obtain a financial overview of the store (e.g., balance sheet, inventory, deposits), B) demonstrates a positive cash flow, and C) understands the relationship between pricing strategies, sales, and profits.
 - 1. Informs and trains level I and new students on beginning activities (e.g., counts, verification of cash drawer) (NS–MA:388; CR–1D; WorkKeys; SBE-XIII) using a variety of media to explain insights (CLAS 9).
 - 2. Uses loss report for unsold, perishable merchandise to adjust orders (SBE-VI).
 - 3. Prepares an order inventory (SBE-VII; WorkKeys).
 - 4. Uses a variety of computational methods (CMS 7) to prepare daily reports (SBE-X; WorkKeys).

STRAND II: FACILITIES AND EQUIPMENT MANAGEMENT

CONTENT STANDARD: *The student identifies and applies requirements and regulations for operation and maintenance of facilities and equipment in a SBE.*

- B. The student A) adheres to local and state requirements for store operation (e.g., health and fire codes, sales license), B) utilizes space to maximize sales and facilitate store operations, and C) utilizes and maintains facilities and equipment in a SBE.
 - 1. Trains new people on operation and maintenance of pertinent equipment (SBE-IX) and develops and uses criteria to evaluate the effectiveness of the communication (CLAS 13).
 - 2. Adheres to environmental health department codes (SBE-XIII; WorkKeys).
 - 3. Meets ADA accessibility guidelines and regulations (SBE-XIII; WorkKeys).
 - 4. Integrates safety rules in all lab practices (SBE-XIII).
 - 5. Complies with fire drills, evacuation, and lock down procedures (SBE-XIII).
 - 6. Creates lists for equipment and supplies needed for the SBE (SBE-II).
 - 7. Recognizes and identifies OSHA requirements for SBE (SBE-XIII) and uses discussions with peers as a way of understanding and applying this information (CLAS 22).
 - 8. Views district training videos (e.g., food, safety) (SBE-XIII).

STRAND III: MARKETING FUNCTIONS

CONTENT STANDARD: *The student understands the functions of marketing in relationship to a SBE.*

- C. The student describes the characteristics of product, price, place, and promotion in the SBE.
 - 1. Accurately interprets information presented in technical documents (CLAS 18) to analyze new products (SBE-XI).
 - 2. Utilizes creative displays to attract buyers (SBE-I, XI) and uses criteria to evaluate the effectiveness of this method of communication (CLAS 13).
 - 3. Demonstrates a creative approach to marketing functions (SBE-XI).
 - 4. Handles returns and damaged products (SBE-VI).
 - 5. Synthesizes and organizes information from a variety of sources (CLAS 19), including pictures and symbols (CLAS 6) to create a promotional item (e.g., poster, newspaper ad) (SBE-XI).

STRAND IV: CUSTOMER SERVICE

CONTENT STANDARD: *The student explores the role of the SBE in the school and community.*

- D. The student applies general business practices to the SBE operation (e.g., store training, safety practice, customer service).
 - 1. Practices job rotation (SBE-XIII; WorkKeys).
 - 2. Performs activities in the selling function (SBE-XII).
 - 3. Knows and follows company policy and services (SBE-XIII).
 - 4. Uses the results of a well-designed and well-conducted survey (CMS 17) to provide a product or service to meet customers needs (SBE-VIII, XIII; WorkKeys).
 - 5. Creates responses that evaluate problems and offers solutions (CLAS 3) when training new students in customer service (SBE - VIII, XIII).

Marketing Lab II

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: FINANCIAL MEASURES

CONTENT STANDARD: *The student explores the financial planning involved in a school-based enterprise (SBE).*

1. The student trains new students on the proper procedures for a variety of activities essential in the selling process (e.g., verifying a cash drawer, making change). See the illustrations in Strand I, Marketing Lab I.
- 2, 3. The student uses site based information (e.g., What didn't sell?) to suggest adjustments in inventory and orders and prepares the order for the next day.
 - ✓ suggestions
 - ✓ adjustments made
 - ✓ reasonableness
4. The student learns that accurate accounting and reporting is essential for a successful SBE. School stores are also open to auditors and, therefore, required to keep meticulous records. The student enters daily transactions in a journal or ledger, fills out deposit slips, and verifies cash and deposits per APS financial procedures.
 - ✓ adherence to required reporting procedures
 - ✓ accuracy

STRAND II: FACILITIES AND EQUIPMENT MANAGEMENT

CONTENT STANDARD: *The student identifies and applies requirements and regulations for operation and maintenance of facilities and equipment in a SBE.*

1. The student demonstrates to new students proper operation and maintenance of all SBE equipment and then supervises the new students as they practice the new procedures (e.g., cash registers, ovens, fountain).
 - ✓ modeling
 - ✓ supervision
 - ✓ safety practices
- 2 – 4, 7, 8. The student views the Learning Activity Packet (LAP) on safety practices and completes the suggested activities. Upon completion, the student explains orally or in a written format the OSHA and environmental health requirements as they apply to the individual's store.
 - ✓ individual participation
 - ✓ understanding of key concepts
 - ✓ effective communication

- ✓ listening skills
- ✓ application of guidelines, practices, and regulations

5. During routine fire drills, evacuation, and lock down procedures, the student communicates the procedures to the new students and guides them through the processes. He/She is also responsible for the major emergency shut down” techniques.

- ✓ fulfillment of responsibilities
- ✓ leadership
- ✓ adherence to safety practices and guidelines

6. The student is attentive to equipment and supplies needs and fills out the proper requisition forms for repairs and replenishment of supplies when necessary.

- ✓ attention to detail
- ✓ proper completion of forms
- ✓ expediency

STRAND III: MARKETING FUNCTIONS

CONTENT STANDARD: *The student understands the functions of marketing in relationship to a SBE.*

1, 2. The student learns that promotion activities are used to inform, persuade, and remind customers about a business’ goods and services.

The school store, like a business, should utilize promotional activities to increase selling opportunities. The student introduces a “taste testing” of a new product, conducts a survey, analyzes the data, and presents the findings to the class.

- ✓ completion of all components
- ✓ strategies employed
- ✓ effectiveness of the promotional activity
- ✓ insights

2, 3, 5. The school store is very visible on campus and is geared as a profit making enterprise. Therefore, the site should be maintained in a manner that attracts customers—namely, the students and staff. The student creates a new layout design for the products in the store.

- ✓ creativity
- ✓ appeal

4. The student checks that merchandise arrives in salable condition. If it is damaged or soiled, the student notifies the company at once for adjustment or replacement. The vendor informs the student of the procedure to follow to get the items replaced. The main task of the student is to gather information regarding the vendors’ policy on damaged merchandise, ensure that credit is issued, and that the store is not left with merchandise that cannot be sold.

- ✓ efficient handling of damaged merchandise
- ✓ adherence of procedural directives

STRAND IV: CUSTOMER SERVICE

CONTENT STANDARD: *The student explores the role of the SBE in the school and community.*

- 1, 3. The student, working in groups, writes a job description for each job in SBE and creates an organizational chart that shows when students are to report to work, break times, and work hours for special events (e.g., Open House).
 - ✓ equitable scheduling
 - ✓ organization
 - ✓ knowledge of school policies
 - ✓ team work
 - ✓ effective writing elements

- 2, 5. The student learns throughout his SBE experience that “the customer is always right” and that “a repeat customer is a valued customer”. With this in mind, the student, in a small group setting, relates a situation where a customer was dissatisfied or made a complaint and tells how he/she handled the situation and the outcome of the situation.
 - ✓ problem-solving strategies
 - ✓ conflict resolution skills
 - ✓ appropriate behaviors (e.g., courtesy, good listener)
 - ✓ effective communication

4. For the most part the SBE provides a service to the students at a school. Faculty and other staff members avail themselves of the services, probably, on a more infrequent basis. To draw the faculty more into the store, the student starts a coffee club. He/She designs a flyer which states that the faculty or staff member is entitled to a free cup of coffee after purchasing a certain number (e.g., 12) of cups. After a period of time, the student determines the effectiveness of the campaign and makes adjustments.
 - ✓ creativity
 - ✓ display areas
 - ✓ effectiveness
 - ✓ analysis
 - ✓ adjustments

Marketing Lab III

Pathway Standards

Marketing Lab III is the capstone course for marketing lab students. The student schedules and manages peers in a controlled learning environment and applies managerial principles in daily retail activities. Areas of study are financial measures, facilities and equipment management, marketing functions, and career readiness.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR) and the SBE Operational Guide (SBE).

STRAND I: FINANCIAL MEASURES

CONTENT STANDARD: *The student explores the financial planning involved in a school-based enterprise (SBE).*

- A. The student applies principles of sound financial planning to include preparation of income statements and balance sheets, prepares cash flow projections, examines the relationship between pricing strategies, sales, and profits, and demonstrates favorable SBE earnings.
 - 1. Uses a variety of computational methods (CMS 1) to deposit information and uses X and Z tapes for verification (SBE–X; WorkKeys).
 - 2. Prepares and analyzes income statements (SBE–X) and generates different representations to model a specific numerical relationship given one representation of data (CMS 5).
 - 3. Compares and draws conclusions between two or more sets of univariate data using basic data analysis techniques and summary statistics (CMS 18) to study previous year's reports to analyze this year's program (SBE–X).
 - 4. Oversees inventory reports and orders (SBE–VII).
 - 5. Uses a variety of computational methods (e.g, mental arithmetic, paper and pencil, and technology tools (CMS 7) to prepare and verify a balance sheet (SBE–X; WorkKeys).
 - 6. Uses a variety of computational methods (CMS 1) and appropriate technologies to collect, keep track, and analyze (CSS 3) vendor accounts, balances, and payments (SBE–V).
 - 7. Uses technology to keep track of monthly financial statements (e.g., Quick Books, Simple Retailer) (SBE–X; WorkKeys) and understands the differences between various methods of data collection (CMS 15).
 - 8. Establishes bookkeeping procedures (SE–X).
 - 9. Prepares a SBE operating budget (SBE–X).
 - 10. Analyzes causes of shrinkage (SBE–VII).

STRAND II: FACILITIES AND EQUIPMENT MANAGEMENT

CONTENT STANDARD: *The student identifies and applies requirements and regulations for operation and maintenance of facilities and equipment in a SBE.*

- B. The student A) adheres to local and state requirements for store operation (e.g., health and fire codes, sales license), B) utilizes space to maximize sales and facilitate store operations, and C) incorporates current technology and equipment (e.g., security system, POS system).

1. Supervises and evaluates new people in operation and maintenance of equipment (SBE–XIII, XIV).
2. Uses a variety of techniques for researching topics including summarizing, cross referencing, and use of interactive technologies to (CLAS 5) train and explain to new members environmental health department codes (SBE–XIII, XIV; WorkKeys).
3. Synthesizes and organizes information from a variety of sources to (CLAS 19) explain OSHA guidelines to new students and trains them in the compliance of those guidelines (SBE–XIII, XIV; WorkKeys).
4. Meets ADA accessibility guidelines and regulations and monitors new people to ensure they also follow the guidelines (SBE–XIII, XIV; WorkKeys).
5. Establishes safety practices in the lab and uses a variety of media to train new people when explaining insights and assuring compliance (SBE–XIII, XIV)(CLAS 9)
6. Supervises the compliance of fire drills, evacuation, and lock down procedures (SBE–XIII, XIV).
7. Operates the security system efficiently (SBE–II, XIII, XIV; WorkKeys).

STRAND III: MARKETING FUNCTIONS

CONTENT STANDARD: *The student understands the functions of marketing in relationship to a SBE.*

- C. The student describes the characteristics of product, price, place, and promotion in the SBE.
 1. Utilizes marketing research to design and conduct scientific investigations to make marketing decisions (CSS 2)(SBE–IV).
 2. Sets prices based on cost factors and demand (SBE–II, IV).
 3. Evaluates product selection (SBE–V).
 4. Handles discrepancies with vendor orders (SBE–VI).
 5. Synthesizes a variety of visual information including pictures and symbols (CLAS 6) to demonstrate that merchandising/ promotional activities impact sales and/or builds store image (SBE–XI).
 6. Analyzes and evaluates creative displays to attract buyers (SBE–XI).
 7. Creates and implements a variety of promotional activities to appeal to target market (SBE–XI).
 8. Serves on advisory committees (e.g., procedures, advertising) (SBE–II, XI, XII) and responds reflectively (through small group discussion, class discussion, journal entry, essay, letter, dialogue) to written and visual texts (CLAS 2)..

STRAND IV: CAREER READINESS

CONTENT STANDARD: *The student explores the role of the SBE in the school and community.*

- D. The student applies general business practices to the SBE operation (e.g., store training, safety practice, customer service).
 1. Provides mentoring for new and Marketing Lab I and II students (SBE–III).
 2. Utilizes organizational chart and job descriptions (SBE–III).
 3. Uses appropriate technologies to collect, analyze (CSS 3), conduct, and complete customer follow-up studies (SBE–VIII).
 4. Adheres to enterprise's policies as they relate to selling (SBE–III, XIII; WorkKeys).
 5. Designs and conducts scientific investigations (CSS 2) to analyze sales to determine product success/failure (SBE–XI, XII).
 6. Estimates the rate of change (CMS 14) and adjusts inventory based on customer demand (SBE–VII).

Marketing Lab III

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: FINANCIAL MEASURES

CONTENT STANDARD: *The student explores the financial planning involved in a school-based enterprise (SBE).*

1. See the first illustration in Strand I, Marketing Lab I and II.
- 2, 3. The student analyzes sales trends for differentiations in year to year profits and makes recommendations and adjustments that are reasonable and feasible.
 - ✓ analysis
 - ✓ insights
- 4, 5, 9. The student verifies that orders are prepared and accurate, receives orders, extends invoices, and ensures that all preparations are made for the next day's business.
 - ✓ documentation
 - ✓ adjustments
 - ✓ thoroughness
- 6 – 8. Using the SBE's software programs, the student enters pertinent information and creates a financial report. He/She works with other school staff to ensure compliance with APS financial procedures.
 - ✓ cooperation and collaboration
 - ✓ teamwork
 - ✓ adherence to school policies
 - ✓ technological skills
 - ✓ business acumen
10. As a worker in a school-based enterprise, the student is responsible for protecting the value of the assets of the business from shrinkage. The student identifies areas of the business that have potential for shrinkage and provides suggestions to improve the inventory control or security procedures to minimize shrinkage.
 - ✓ thoughtful analysis
 - ✓ viable suggestions

STRAND II: FACILITIES AND EQUIPMENT MANAGEMENT

CONTENT STANDARD: *The student identifies and applies requirements and regulations for operation and maintenance of facilities and equipment in a SBE.*

- 1–6. Students need to be supervised in the school store at all times. The Level III student, as supervisor, is responsible for modeling appropriate behaviors at all times, for training new students in policies, guidelines, and regulations (e.g., health, safety, conduct) to be observed at all times, and in the evaluation of those students. The student, as leader, discusses with the newer students grounds for dismissal from the program (e.g., dishonesty, insubordination, negligence) and evaluation requirements and procedures (e.g., how often, grades).
- ✓ adherence to rules
 - ✓ safety practices
 - ✓ appropriate behaviors
 - ✓ effective communication
 - ✓ initiative
7. The student, working with supervisor and school administrators, monitors the operation of the security system as to its effectiveness and makes recommendations as to how the system can be improved if found to be faulty.
- ✓ judgments
 - ✓ feasibility of recommendations (e.g., budgetary considerations)

STRAND III: MARKETING FUNCTIONS

CONTENT STANDARD: *The student understands the functions of marketing in relationship to a SBE.*

- 1–3, 5–7. Much of the success of a SBE is based on its ability to conduct research relating to its target market, competition, its customers, and what products and services are offered and sold. Marketing research takes much of the guesswork away from the student. Also there are many occasions throughout the year that provide opportunities for promotional themes. The student selects a promotional project that involves research and a new idea that is announced either through a visual display or another form of advertising. The idea is implemented and after a time evaluated for its effectiveness.
- ✓ evidence of research
 - ✓ originality
 - ✓ promotional strategy
 - ✓ evaluation
 - ✓ overall quality and effectiveness of project
4. See Strand III, Marketing Lab II, the third illustration.
8. Many of the functions of a SBE are carried out through committee work. Each student is part of one or several committees and shares responsibility with its members. The more experienced student, Level II and Level III, assumes an additional responsibility by serving in an advisory capacity for the school store. This advisory committee provides the school store with realistic suggestions for store policies, procedures, equipment, facility needs, and usage. In addition, this experience enhances the student's expertise and knowledge.
- ✓ individual participation
 - ✓ decision-making skills
 - ✓ facilitation

- ✓ service to the school

STRAND IV: CAREER READINESS

CONTENT STANDARD: *The student explores the role of the SBE in the school and community.*

- 1, 2, 4, 5. Working in small groups, the student writes a job description and evaluation for each position required in the store, an evaluation instrument for each position, and a training manual for the new students. Although many responsibilities are common to several positions, it is helpful to know what is expected in each position. The training manual communicates to the students the store's procedures, rules, expectations goals, and philosophy. It is an excellent way to ensure that the school store runs smoothly and consistently. It also reduces time spent in reviewing or explaining procedures. Each student is expected to read the manual and be familiar with its contents. Assessment can occur in a variety of ways.
- ✓ completion of all tasks
 - ✓ all required components
 - ✓ individual participation
 - ✓ internalization of contents of the manual
 - ✓ effective communication
- 3, 6. The student participates in a marketing research project that analyzes customer buying trends to discover the customer's needs, wants, and desires. He/She utilizes the results of the study to make adjustments in the SBE.
- ✓ analysis of research
 - ✓ applications
 - ✓ adjustments

Advanced Marketing Pathway Standards

Advanced Marketing provides an in-depth study of the components of the marketing mix. The student acquires knowledge in the areas of marketing planning, ethics, economics, products, services, and pricing. Other areas of study include Career Readiness, Marketing Strategies, Free Market Economy, and Marketing Research.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), National Retail Skill Standards (NRSS), National Standards for Business Education (NBEA), and the National Marketing Education Standards (NMES).

STRAND I: CAREER READINESS

CONTENT STANDARD: *The student explores the role of marketing in a global economy.*

- A. The student A) identifies the roles of marketing and analyzes the impact of marketing on the individual, business and society and B) defines, develops, and applies a code of ethics to various marketing issues.
 - 1. Demonstrates skills required for a career in the marketing industry (CR-1A).
 - 2. Forms and refines questions for investigation to (CLAS 1) research careers in the marketing industry (CR-1A, 1C).
 - 3. Responds to information texts by using a variety of strategies (CLAS 4) to develop and revises a career plan consistent with career interests, aptitudes, and abilities (CR-1C).
 - 4. Examines texts for arguments and develops informed opinions (CLAS 11) to assess opportunities for employment and entrepreneurial endeavors in marketing (CR-1B).
 - 5. Defines the roles and functions of individuals engaged in marketing careers (CR-2C, 3A).
 - 6. Uses a variety of technology tools to present (CLAS 27) and explain the role of utility in facilitating exchange (NMES-BA:001).
 - 7. Reads critically and independently to draw conclusions (CLAS 21) to compare the American marketing system with those found in other countries (NMES-EC:007).
 - 8. Compares and contrasts marketing strategies for products, services, ideas, and persons (CLAS 21)(CR-5E, 5F).
 - 9. Analyzes ethical and social responsibility issues related to marketing (CR-5E, 5F).
 - 10. Analyzes arguments, concepts, and perspectives (CLAS 31) to differentiate between ethics and government regulations (NRSS-1.2.4, 5.1.4).
 - 11. Describes a code of ethical behavior for marketing (NMES-PD:006; NRSS-1.2.4, 5.1.4) and uses discussion with peers as a way of understanding ethical behavior (CLAS 22).
 - 12. Identifies ethical considerations relating to truth in advertising, selling and packaging, pricing, and product development (NMES-SE:932; NRSS-1.2.4, 5.1.4).
 - 13. Reads critically and independently (CLAS 21) to determine how patents, copyrights, and trademarks are used to combat unethical behavior (NRSS-1.2.4, 5.1.4).
 - 14. Develops a presentation by using clear research questions and critical research strategies (CLAS 28) to illustrate how unethical behavior can lead to fraudulent behavior and governmental regulations (NMES-DS:026, PD:006, PM:001; NRSS-1.2.4, 5.1.4).

STRAND II: MARKETING STRATEGIES

CONTENT STANDARD: *The student describes the characteristics of product, price, place, and promotion in the marketing process.*

B. The student explains the roles and strategies for implementing each of the elements of the marketing mix.

1. Designs and conducts scientific investigations that include testable hypothesis, controls and variables, methods to collect, analyze, and interpret data (CSS 2) to describe how new product/services are conceived, developed and test marketed (NMES-PM:001, EC:003, PM:003, PM:013; NRSS-1.2.3).
2. Lists the steps of the product life cycle and identifies in which stage a product is located (NMES - PM:001; NRSS - 1.2.3).
3. Synthesizes and organizes information from a variety of sources (CLAS 19) to identify and describe the effects of increased global trade on packaging (NMES-EC:016; NRSS-1.2.3).
4. Defines the nature of a product mix in a particular company (NMES-PM:003; NRSS-1.2.3).
5. Identifies product mix decisions that must be made in order to market the product or service (NMES-PM:003, PM:001; NRSS-1.2.3).
6. Uses language persuasively (CLAS 15) to explain the advantages and disadvantages of product line diversification (NMES-PM:003, PM:001; NRSS-1.2.3).
7. Use multiple resources to gather information to evaluate and (CLAS 8) explain the need for comprehensive marketing of the extended product (e.g., warranty, service contract) (NMES-EC:006; NRSS-1.2.3).
8. Accurately interprets information presented in a technical format (CLAS 18) to identify and explain the various objectives of pricing (NRSS-1.2.3).
9. Composes written arguments (CLAS 30) and demonstrates an understanding of the relationships between ratios, proportions, and percents (CMS 4) to explain the use of break-even analysis to determine price (NRSS-1.2.3).
10. Uses a variety of computational methods to estimate (CMS 1, 7) and calculate a product's price using a variety of methods (NRSS-1.2.3).
11. Estimates the rate of change in the context of a problem (CMS 14) to explain the concept of price elasticity and how it affects price (NMES-EC:006; NRSS-1.2.3).
12. Describes the alternative new-product pricing strategies of skimming and penetration and explains when each is applicable (NMES-EC:006; NRSS-1.2.3).
13. Generates an algebraic sentence to model (CMS 8) and explain how international currency exchange rates affect the prices of exported products (NRSS-1.2.3).
14. Uses multiple resources to gather information and (CLAS 8) describe how economies of scale attained through mass production affect pricing strategy (NMES-EC:016, EC:007; NRSS-1.2.3).
15. Determines various indirect channels of distribution and when each is most appropriate to use (NRSS-5.1.4).
16. Identifies the most efficient means for distributing a product or service (NRSS-5.1.4) and makes a well-informed and well-organized formal presentation with a clear main point, adjusting the message, wording, and delivery to a particular audience (CLAS 29).
17. Uses a variety of technology tools (CLAS 27) to describe the importance of inventory control in the marketing process (NMES-DS:019, DS:022, DS:026; NRSS-5.1.4).
18. Develops a distribution plan for a given product (NRSS-1.1.1, 1.2.2, 2.3.1) that demonstrates control of grammar, paragraph, and sentence structure (CLAS 20).
19. Uses a variety of technology tools (CLAS 27) to design advertisements (NMES-PR:016, PR:014, PD:12; NRSS-1.1.1, 1.2.2, 2.3.1).
20. Identifies the factors that determine media selection (NMES-PR:010; NRSS-1.1.1, 1.2.2, 2.3.1).

21. Develops an appropriate strategy using a variety of data from surveys, samplings, estimations, and inferences (CMS 3) to explain how research can be used in the advertising process (NRSS-1.1.1, 1.2.2, 2.3.1).
22. Describes the roles of copyrighting, art direction, and production in the creative process (NMES-PR:057, PR:014, PR:016, PD:012; NRSS-1.1.1, 1.2.2, 2.3.1) and how these technologies influences society (CSS 9).
23. Uses an array of media and technologies to examine and comprehend (CLAS 24) how changing technology affects advertising (NMES-PR:010; NRSS-1.1.1, 1.2.2, 2.3.1).
24. Uses a variety of computational methods (CMS 1, 7) to develop an advertising budget (NMES-PR:009; NRSS-1.1.1, 1.2.2, 2.3.1).
25. Reads critically and independently to draw conclusions (CLAS 21) and chooses appropriate sales promotion tools for a particular product or service (NMES-PR:010; NRSS-1.1.1, 1.2.2, 2.3.1).
26. Compares and contrasts the alternative forms of sales promotion (NMES-PR:010; NRSS-1.1.1, 1.2.2, 2.3.1).
27. Generates an algebraic sentence to model (CMS 8) the factors used to determine the proportion of the promotional budget that should be allocated to sales promotion vs. advertising (NMES-BA:024, PR:009; NRSS-1.1.1, 1.2.2, 2.3.1).
28. Describes how marketers combine trade and consumer promotions in developing effective promotional programs (NMES-IM:196; NRSS-1.1.1, 1.2.2, 2.3.1).
29. Composes written arguments (CLAS 30) to critique public relations activities being used by marketers (NRSS-1.1.1, 1.2.2, 2.3.1).
30. Differentiates between public relations activities and publicity (NRSS-1.1.1, 1.2.2, 2.3.1).
31. Uses discussion with peers (CLAS 22) to understand how companies can control (or at least minimize) unfavorable publicity (NRSS-1.1.1, 1.2.2, 2.3.1).
32. Supports an informed opinion by using appropriate language, reason, and organizational skills (CLAS 26) to describe the qualities necessary for success as a sales manager (NMES-MN:024, MN:030, MN:034, MN:084, SE:055, SE:864, PD:019; NRSS-1.1.1, 1.2.2, 2.3.1).
33. Identifies the roles played by people involved in the purchase or use of the product (NMES-IS:013; NRSS 1.1.1, 1.2.2, 2.3.1).
34. Accurately interprets information presented in a technical format (CLAS 24) to evaluate a variety of sales approaches (NRSS-1.1.1, 1.2.2, 2.3.1).
35. Analyzes arguments, concepts, and perspectives (CLAS 31) to identify and explain the various types of sales personnel (NMES-PD:024; NRSS-1.1.1, 1.2.2, 2.3.1).
36. Describes the functions of sales managers, including personnel and budget management (NMES-BA:022, BA:024, MN:029, MN:019, MN:691, MN:031, MN:084, MN:034, MN:025, PD:019, MN:030; NRSS-1.1.1, 1.2.2, 2.3.1).

STRAND III: FREE MARKET ECONOMY

CONTENT STANDARD: *The student identifies the characteristics of a free market economy.*

- C. The student A) identifies numerous marketing variables and strategies in dealing with a diversified marketplace and B) identifies and explains how external factors influence/dictate marketing decisions.
 1. Informs an audience by using a variety of media to research and explain (CLAS 9) how government regulations differ among countries and their effects on business (NRSS-1.2.4, 1.2.5).
 2. Analyzes the impact on specific government regulations on doing business both domestically and internationally (NMES-EC:016; NRSS-1.2.4, 1.2.5).
 3. Compares the relative merits of having more or less government regulation of marketing (NMES-EC:007; NRSS-1.2.4, 1.2.5).
 4. Synthesizes and organizes information from a variety of sources (CLAS 19) to identify the effects government regulation has had on specific industries (NMES-EC:007; NRSS-1.2.4, 1.2.5).

5. Creates multiple displays of data to explain (CSS 7) and determine the ways in which economic conditions, both domestically and internationally, affect marketing strategy (NMES-EC:018, EC:016, EC:017, EC:011; NRSS-1.2.4, 1.2.5).
6. Identifies specific special interest groups and describes how they affect marketing (NMES-EC:014, EC:015; NRSS-1.2.4, 1.2.5).
7. Analyzes the ways in which business may respond to the concerns of special interest groups (NMES-FI:002, EC:015; NRSS-1.2.4, 1.2.5).
8. Identifies specific differences in cultural norms and values that may influence marketing (NRSS-1.2.4, 1.2.5).
9. Uses multiple resources to gather information, evaluate problems, and examine cause and effect relationships, (CLAS 8) to describe and inform an audience on how cultural differences, both domestically and internationally, affect each element of the marketing mix (NMES-PM:003, IM:196; NRSS-1.2.4, 1.2.5).
10. Effectively uses a variety of interactive technologies (CLAS 23) in marketing activities (NMES-BA:002, PR:010; NRSS-1.2.4, 1.2.5).
11. Differentiates between direct and non-direct competition and how each affects marketing strategy (NRSS-1.2.4, 1.2.5).
12. Analyzes the competition for a specific product or service and determines how its strengths and weaknesses lead to identification of opportunities (NMES-EC:010, EC:011, EC:016, IS:015, IS:015, IS:014, PD:012; NRSS-1.2.4, 1.2.5).
13. Develops strategies to influence rational and emotional buying motives (NRSS-1.1.1).
14. Differentiates between the consumer market and non-consumer market (NRSS-1.1.1).
15. Composes written arguments that (CLAS 30) describe various methods of market segmentation (NMES-IM:196; NRSS-1.1.1).
16. Uses appropriate technologies to collect, analyze, and communicate findings (CSS 3) when identifying a target market for a given product or service (NMES-IS:196; NRSS-1.1.1).
17. Explains why market segmentation is important to the achievement of market goals (NMES-IM:196; NRSS-1.1.1).
18. Explains the marketing strategies used to reach a given target market (NMES-IM:196; NRSS 1.1.1).
19. Determines extended product features that give a product the competitive edge (NMES-PM:001; NRSS 1.1.1).

STRAND IV: MARKETING RESEARCH

CONTENT STANDARD: *The student explores and identifies the components of successfully marketing a product/service.*

D. The student explores the process of developing a marketing plan based on marketing research.

1. Explains why marketing planning is essential for organization and product success (NBEA–MK V, Level 3.1; CR–3C, 5F).
2. Identifies the steps in the marketing research process (NBEA–MK V, Level 3.5; CR-1D).
3. Describes the essential components of an investigation, including appropriate methodologies, proper equipment, and safety precautions (CSS 1) when explaining the purposes for conducting marketing research (NBEA–MK V, Level 3.1; CR-5F).
4. Differentiates between primary and secondary sources of data (NBEA–MK V, Level 3.2; CR-5F).
5. Identifies the steps involved in the development of a marketing plan (NBEA–MK VI, Level 3.3; CR-5F).
6. Explains how the marketing plan encompasses all elements within marketing (NBEA–MK VI, Level 3.1, 3.5; CR-5F).
7. Differentiates between strategic and short-term tactical planning (NMES-PM:001; NBEA–MK VI, Level 3.2, 3.4; CR-2A, 5A).

Advanced Marketing

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: CAREER READINESS

CONTENT STANDARD: *The student explores the role of marketing in a global economy.*

1–5. The student, as part of a group, selects a marketing-related career to research. The student develops appropriate interview questions, locates a person working in that career, and arranges for an interview. During the interview, the student gathers the following information:

- the roles and functions of that individual in the specific career
- opportunities for employment and entrepreneurial endeavors in the field
- education, training requirements, and opportunities for advancement
- personal interests and aptitudes that are helpful in the career

Following the interview, the student, within a small group, develops a written career plan consistent with the information gathered from the interview as well as personal interests. The student presents to the class his/her findings regarding the career researched.

- ✓ completion of all components of the project
- ✓ individual participation
- ✓ relevance of presented material
- ✓ effective delivery of presentation

6–8. The student participates in a class discussion on a topic (e.g., greed). The student defines and gives examples of what he/she believes about the topic. The student charts the class ideas/beliefs and values the diversity of the beliefs. Following the discussion, the student views a video (e.g., Greed in America). The student takes notes during the video. Following the video, the class compares the charted ideas/beliefs with the video concepts and discusses differences (e.g., Is greed good or bad?; Why or why not?).

- ✓ individual participation
- ✓ note taking
- ✓ listening skills
- ✓ analysis
- ✓ comparisons and contrasts

9–14. The student participates in a class discussion on the topic of personal and business ethics. The student chooses an aspect of ethical business behavior, researches the aspect, and writes a position paper on the selected aspect. The student shares his/her views with the class.

- ✓ insights/perspective
- ✓ research
- ✓ individual participation
- ✓ effective delivery of presentation

- ✓ ethical considerations

STRAND II: MARKETING STRATEGIES

CONTENT STANDARD: *The student describes the characteristics of product, price, place, and promotion in the marketing process.*

- 1–36. The student, working alone or in small groups, develops an original/unique product/service in the global marketplace (with instructor approval of product/service) and applies the “Four Ps” (i.e., product, price, place, promotion) of the marketing mix to that product/service. Each student/group creates a multimedia presentation for the product/service. The presentation includes: production plan, pricing strategies, distribution plan, and promotion plan. Each element must include examples of marketing activities. Following each presentation the student/group fields questions from the class members and defends his/her product/service.
- ✓ all required components
 - ✓ examples of marketing activities for each of the Four Ps
 - ✓ individual participation
 - ✓ creativity/originality
 - ✓ knowledge of the Four Ps
 - ✓ effective delivery of presentation
 - ✓ realistic application of the Four Ps
 - ✓ defense of project
 - ✓ problem solving
 - ✓ strategies
 - ✓ technology
 - ✓ critique/analysis/evaluation

STRAND III: FREE MARKET ECONOMY

CONTENT STANDARD: *The student identifies the characteristics of a free market economy.*

- 1–7. Following an overview of federal and state governmental agencies, the student is assigned an agency to research. The research includes: why the agency was created, what the current purpose of the agency is, how the agency impacts business and our economy, how the agency impacts individuals, any current major cases involving the agency, other issues involving the agency and relevancy of the agency. After completing the research, the student presents this information to the class and leads the class discussion regarding the agency.
- ✓ required components
 - ✓ accuracy of information
 - ✓ analysis of information
 - ✓ effective delivery of presentation
 - ✓ active listening
 - ✓ individual participation

- 8–19. The student, working alone or in small groups, selects and researches (e.g., Internet, library) a country and that country's culture and norms. Each student/group presents the findings to the class using multi-media illustrations and examples. The presentation includes: an overview of the country's history, language and location, political system, monetary system, economic system and comparison and contrast of the marketing of products and services with the norms of marketing in the United States of America. **NOTE:** This activity ties in well with the viewing of *The World's Funniest Commercials*. This show is on a major television network. The focus of the presentation is

on cultural norms, not a particular product/service.

- ✓ required components
- ✓ technology
- ✓ individual participation
- ✓ creativity/originality
- ✓ effective delivery of presentation
- ✓ analysis of information
- ✓ active listening

STRAND IV: MARKETING RESEARCH

CONTENT STANDARD: *The student explores and identifies the components of successfully marketing a product/service.*

1–7. The student creates a marketing plan following the DECA Guide. The plan includes the following events: Fashion Merchandising Promotion Plan, Entrepreneurship Participating Event, Entrepreneurship Written Event, E-Commerce Business Plan Event, Advertising Campaign Event, Technical Marketing Representative Event and the Marketing Research Events. The student follows the deadline dates and submits a final copy of the project.

- ✓ adherence to deadlines/due dates
- ✓ adherence to guidelines
- ✓ quality of project
- ✓ creativity within guidelines
- ✓ marketing research
- ✓ originality
- ✓ documentation of sources

Business, Marketing, & Finance I

Pathway Standards

Business, Marketing, & Finance I is an innovative, introductory course which explores the world of business, marketing, and finance. This course focuses on the skills, knowledge, and attitudes demanded by employers in the workplace. Areas of study include career interests and aptitudes, employability skills, business, economic, financial, and marketing concepts. Emphasis is placed on business computer applications including word processing, spreadsheets, and multimedia applications.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), National Standards for Marketing Education (NSME), National Standards for Business Education (NBEA), New Mexico State Marketing Education Standards (NMMS), Entrepreneurship Education Standards (EES), New Mexico Standards for Business Services and Technology (BST), WorkKeys, the Work Site Programs Standards Manual (WSPSM), and the Albuquerque Public Schools Communication Skills Standards (CS).

STRAND I: CAREER INTERESTS AND APTITUDES

CONTENT STANDARD: *The student identifies potential career interests and aptitudes which support personal career goals and lifelong learning.*

- A. The student assesses personal skills, abilities, aptitudes, personal strengths, and weaknesses as they relate to careers in business, marketing, and finance.
 - 1. Identifies personal and work-related interests (CR: 1A; WSPSM; NBEA).
 - 2. Completes a standardized career-interest survey (CR: 1A).
 - 3. Assesses and analyzes personal talents, values, and interests (CR: 1A; WSPSM; NBEA).
 - 4. Compares personal skills and aptitudes with various career options CR: 1A).

STRAND II: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student develops skills necessary to find and maintain employment.*

- B. The student relates the importance of workplace expectations.
 - 1. Communicates effectively as writer, listener, and speaker in a business setting (CLAS 14,15,19,20)(NBEA; WorkKeys).
 - 2. Develops competence with speaking and language conventions (e.g., grammar, standard English, diction) by using correct language conventions (CLAS 20)(NBEA; CS–IV.2) and uses language persuasively in addressing a particular issue (CLAS 15).
 - 3. Demonstrates ethical work habits: (WSPSM; WorkKeys).
 - follows directions
 - meets deadlines
 - respect for others
 - collaboration and cooperation
 - conforms to established rules and regulations
 - 4. Develops interpersonal, teamwork, and leadership needed to function in diverse business settings (NBEA; CR-5C, 5D).
 - 5. Develops positive behavior, conduct, and social manners within the school, work place and community (NBEA; WSPSM).

6. Acquires job acquisition skills (CR-1D; NBEA).
7. Develops competence and fluency in using the writing process to create a final product (CLAS 20)(CS–III.1).
8. Uses discussion with peers as a way of understanding information (CLAS 22), asks critical questions prompted by texts, uses an array of media and technologies to examine and comprehend text (CLAS 24), and researches answers for a broader understanding (CS–I.1).

STRAND III: BUSINESS, ECONOMIC, AND FINANCIAL CONCEPTS

CONTENT STANDARD: *The student develops knowledge of business, economic, and financial principles that govern the free enterprise system.*

- C. The student applies business, economic, and financial principles to understand and manage his/her role in the business world.
 1. Reads critically and independently (CLAS 21) to distinguish between economic goods and services (NSME–EC: 002).
 2. Uses language persuasively (CLAS 15) to explain the principles of supply and demand (NSME–EC: 005).
 3. Uses a variety of technology tools to present information (CLAS 27) that describes the nature of economics and economic activities (NSME–EC: 001).
 4. Accurately interprets information presented in technical formats (e.g., charts, diagrams, tables) (CLAS 18) to determine forms of economic utility created by marketing activities (NSME–EC: 004).
 5. Synthesizes and organizes information from a variety of sources (CLAS 19) to explain the concept of competition (NSME–EC: 012).
 6. Creates and uses criteria to evaluate (CLAS 13) the relationship between government and business (NSME–EC: 008).
 7. Uses multiple resources to gather information to evaluate problems and examine cause and effect relationships (CLAS 8) to recognize effective customer service (NMMS-MA: 386).
 8. Designs and conducts a scientific investigation that includes: testable hypothesis, controls and variable, method to collect, analyze and interpret data (CSS 2) to differentiate between types of business ownership (NSME–BA: 028).
 9. Defines the nature and scope of the pricing function (NSME–PM: 021) and generates different representations to model specific numerical relationships (CMS 5).
 10. Compares and draws conclusions between two or more set of univariate data using basic data analysis techniques and summary statistics (CMS 18) to describe factors affecting pricing decisions (NSME–PI: 002).
 11. Uses psychological pricing to adjust base prices (NSME–PI: 005).
 12. Uses a variety of computational methods and tools (CMS 1,7) to calculate break-even point (NSME–PI: 006).
 13. Explains the concept of private enterprise (NSME–EC: 009).
 14. Uses clear research questions and creative and critical research strategies (CLAS 28) to describe the characteristics of a successful entrepreneur (EES–I).
 15. Explores the meaning of entrepreneurship, its risks, advantages, and disadvantages (EES–I).

STRAND IV: MARKETING CONCEPTS

CONTENT STANDARD: *The student identifies the roles of marketing and analyzes the impact of marketing on the individual, business, and society.*

- D. The student explores the process of developing, promoting, and distributing products to satisfy customers' needs and wants.
 1. Reads critically and independently to draw conclusions from research (CLAS 14) to define marketing and its importance in a global economy (NSME–BA: 003).

2. Synthesizes and organizes information from a variety of sources (CLAS 19) to describe marketing functions and related activities (NSME–BA: 004).
3. Composes written arguments that develop and support informed opinions (CLAS 30) on the nature of branding (NSME–PM: 021).
4. Uses language persuasively (CLAS 15) to explain the role of promotion as a marketing function (NSME–PR: 001).
5. Makes a well-informed and well-organized formal presentation with a clear main point, adjusting the message , wording, and delivery to a particular audience and context (CLAS 29) illustrating the concept of marketing strategies (NSME–IM: 194).
6. Demonstrates a customer-service mindset (NSME–IS: 006).
7. Prioritizes and organizes information to construct a complete and reasonable interpretation of a given situation (NBEA).
8. Uses a variety of information resources to critically interpret and evaluate experiences and ideas (CS–VI.2).

STRAND V: COMPUTER APPLICATIONS

CONTENT STANDARD: *The student acquires and demonstrates business computer application skills.*

- E. The student demonstrates basic word processing, spreadsheet, and presentation software skills.
 1. Navigates the computer-operating system (e.g., retrieve, delete, save, cut and paste, edit) (CR-3D; BST).
 2. Demonstrates basic word processing skills (CR-3B; BST).
 3. Exhibits basic spreadsheet skills (NSME–BA: 034; BST).
 4. Demonstrates basic presentation software skills (NSME–BA: 032; BST).
 5. Practices rules of safe and appropriate conduct when using the Internet and e-mail (CR–4D).
 6. Develops increased competence in using a variety of technology (e.g., word processors, overhead projectors, multimedia) to present information appropriate for the intended purpose and audience (CS–III.3).
 7. Explain how business computer software has influenced workflow and communication in the workplace (CSS 9).

Business, Marketing, & Finance I

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: CAREER INTERESTS AND APTITUDES

CONTENT STANDARD: *The student identifies potential career interests and aptitudes which support personal career goals and lifelong learning.*

- 1–4. Using the “Exploring Careers” materials provided by the Department of Defense, the student completes workbook exercises designed to help him/her take steps toward finding a career that is right for him/her. The process reveals to the student potential careers corresponding to a student’s interests, work values, and personality. The training, education, and skills for these careers are also identified. After completion of the exercises, the student takes the Armed Services Vocational Aptitude Battery (ASVAB) test. A representative from the Department of Defense interprets the results of the test to the student.
- ✓ individual participation
 - ✓ completion of exercises
 - ✓ identification of interests and aptitudes
 - ✓ understanding of the results

OR

(An alternative for schools that do not have access to ASVAB testing.)

- 1–4. A student accesses the U. S. Department of Interior’s “Holland Occupations Themes” website (<http://www.doi.gov>) and completes computerized assessments which identify a student’s personal:
- interests related to the world of work
 - work values and corresponding occupations
 - personality measures and suitable occupations

Based on this information, a student then writes a synopsis of his/her findings and describes how this information is beneficial to his/her future goals.

STRAND II: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student develops skills necessary to find and maintain employment.*

- 1–3, 7. Based on personal interests, the student prepares a résumé and either a letter of application or cover letter stating why he/she has the best qualifications for a particular position.
- ✓ format
 - ✓ writing conventions (e.g., spelling, grammar, punctuation)
 - ✓ clearly stated objective

- 2, 4–6, 8. The student applies what he/she has learned to a fictional company. Assuming the role of the owner of the company, the student develops a rubric that could be used in the hiring of personnel. He/She keeps in mind what he/she is looking for in a résumé and in the individuals to be employed. The student also formulates questions that could be asked in the interview process.
- ✓ appropriate questions
 - ✓ writing conventions
 - ✓ format
 - ✓ evaluation criteria

STRAND III: BUSINESS, ECONOMIC, AND FINANCIAL CONCEPTS

CONTENT STANDARD: *The student develops knowledge of business, economic, and financial principles that govern the free enterprise system.*

- 1, 5, 8, 13–15. Using the same fictional company created in Strand II, the student assumes the role of owner and prepares for the class a presentation about his/her company to include: a) a description of the major goods and/or services sold by the company, b) the type of business ownership selected and why? c) a minimum of three of the company's direct competitors, d) five characteristics of a successful entrepreneur that he/she possesses with an explanation on how these traits benefit his/her business, and e) an explanation of how the company competes with specific examples.
- ✓ completion of all required components
 - ✓ research skills
 - ✓ organization
 - ✓ effective delivery of presentation
 - ✓ problem-solving skills
2. The student demonstrates the interaction of supply and demand in the workplace by participating in the “In the Chips” simulation developed by the Foundation for Teaching Economics (website <http://www.fte.org/teachers/lessons>). The student acts as a buyer or a seller and experiences the competitive nature of markets. As a result, he/she sees how competition influences the price of goods and the decisions of buyers and sellers in the marketplace.
- ✓ comprehension of supply and demand concepts
3. The student asks five people to explain what “economics” means to them and records the responses. He/She compares and contrasts the findings in a one- page summary explaining the similarities and differences identified.
- ✓ understanding of economics
 - ✓ comparisons and contrasts
 - ✓ writing conventions
- 4, 7. Assuming the role of owner of a specific company, the student analyzes the five economic utilities (i.e., form, place, time, possession, information) by selecting a product that is sold by the business. Considering information that the student has learned about economic utilities, the following questions are answered :
- Form – adds value to raw materials to make them useful and deals with the production of the product. Who is the manufacturer of your product?
 - Place – involves having a product where customers can buy it. Where can the product be purchased?
 - Time – offering a product at certain times during the year or having a convenient time of operation. What days and hours does your

company operate? Does your business close on special holidays? If so, when?

- Possession—the actual exchange of a product for monetary value. How does your company add possession utility to its product?
- Information—involves communication with the customer. How specifically does your company communicate with its customers?
 - ✓ comprehension
 - ✓ analysis

6. Using the Internet, the student (or group) investigates a governmental agency (e.g., FTC, EEOC). He/She accesses the appropriate website to research the following questions:

- In what ways does the agency specifically fulfill the purpose of the identified government involvement?
- When was the agency established?
- Is the agency primarily involved in intervening in or regulating the business world? Explain.
- What are some of the laws and/or policies established by the agency?
- What are some current news and/or happenings related to the agency's involvement in businesses?

The student reports findings orally or in written form.

- ✓ inclusion of all required components
- ✓ comprehension
- ✓ clarity in expression of ideas
- ✓ writing/speaking conventions
- ✓ insights/perspectives

9–11. Using the same fictional company created in Strand II, the student develops a price list. Using a spreadsheet, he/she includes an analysis of the pricing strategies used and the factors affecting these prices.

- ✓ all required components
- ✓ analysis
- ✓ understanding of pricing functions

12. Given a financial situation for a business, the student calculates the break-even point (how many items have to be sold to break even or make a profit) for a specified item.

- ✓ understanding of the concept
- ✓ calculations

STRAND IV: MARKETING CONCEPTS

CONTENT STANDARD: *The student identifies the roles of marketing and analyzes the impact of marketing on the individual, business, and society.*

1, 4–6. See Strand III, first illustration. The same activities described introduces the student to the four Ps (i.e., product, price, place, promotion).

2, 4, 5, 7, 8. Working individually or on a team, the student investigates an existing retail organization of his/her choice and applies information learned in class to the chosen business. He/She assumes the role of a customer service consultant and prepares a presentation of findings and recommendations to include: company background, customer services strategies (strengths and weaknesses), types

of merchandise sold, pricing and promotional strategies used, store security and layout type, space productivity techniques, impulse items sold, an evaluation of signs and graphics, and resources used (e.g., person interviewed, newspapers, websites).

- ✓ all required components
- ✓ understanding of marketing functions
- ✓ effective delivery of presentation
- ✓ organization
- ✓ variety of resources

3. The student develops a trademark, brand, and logo for the fictional business he/she has created, presents it for review, and then inserts into his/her portfolio.

- ✓ creativity
- ✓ originality

STRAND V: COMPUTER APPLICATIONS

CONTENT STANDARD: *The student acquires and demonstrates business computer application skills.*

1, 2, 4, 5. See illustrations presented in Strands II, III, and IV. Most of the research, writing, and rubric development required by the student for these strands are accomplished by using the computer.

- ✓ technological skills
- ✓ ethical considerations

3, 4, 6. See Strand III. The illustration addressing performance standards 9 – 11 on pricing requires that the student complete a spreadsheet. By completion of the course, the student has effectively developed and presented a multimedia presentation using clip art, hyperlinks, animation, and preset effects.

- ✓ a variety of technological skills
- ✓ presentation skills

Business, Marketing, & Finance II

Pathway Standards

Business, Marketing, & Finance II continues the exploration of business, marketing, and financial concepts. This course continues to focus on the skills, knowledge, and attitudes demanded by employers in the workplace. The student studies advanced economic, marketing, and financial concepts. Emphasis is placed on business computer applications including word processing, spreadsheets, and multimedia applications.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), National Standards for Marketing Education (NSME), National Standards for Business Education (NBEA), New Mexico State Marketing Education Standards (NMSE), Entrepreneurship Education Standards (EES), New Mexico Standards for Business Services and Technology (BST), WorkKeys, the Work Site Programs Standards Manual (WSPSM), and the Albuquerque Public Schools Communications Skills Standards (CS).

STRAND I: CAREER INTERESTS AND APTITUDES

CONTENT STANDARD: *The student identifies potential career interests and aptitudes that support personal career goals and lifelong learning.*

- A. The student assesses personal skills, abilities, aptitudes, personal strengths, and weaknesses as they relate to careers in business, marketing, and finance.
 1. Researches and identifies personality types.
 2. Analyzes and evaluates personal talents, values, and interests (CR: 1A; WSPSM; NBEA).
 3. Reads critically and independently to draw conclusions from research (CLAS 21) to make value judgments regarding career options (CR: 1A, 1C).
 4. Communicates effectively as writer, listener, and speaks in a business setting (CLAS 20,30)(NBEA; WorkKeys).

STRAND II: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student develops skills necessary to find and maintain employment.*

- B. The student relates and demonstrates the importance of workplace expectations.
 1. Demonstrates ethical work habits: (WSPSM; WorkKeys).
 - follows directions
 - meets deadlines
 - respect for others
 - collaboration and cooperation
 - conforms to established rules and regulations
 2. Demonstrates interpersonal, teamwork, and leadership needed to function in diverse business settings (NBEA; CR-5C, 5D).
 3. Uses discussion (CLAS 22) as a means of handling customer complaints (NMSE-IS:015).
 4. Analyzes and integrates positive behavior, conduct, and social manners within the school, work place, and community (NBEA; WSPSM).
 5. Models job acquisition skills (CR-1D; NBEA).

6. Develops increased competence with speaking and language conventions (e.g., grammar, standard English, diction) by using correct language conventions (CLAS 20) (NBEA; CS–IV.2).
7. Develops increased competence and fluency in using the writing process to create a final product (CS–III.1).
8. Responds reflectively to written and visual texts through small group and class discussion and dialogue (CLAS 22)(CS–IV.6).

STRAND III: BUSINESS, ECONOMIC, AND FINANCIAL CONCEPTS

CONTENT STANDARD: *The student develops knowledge of business, economic, and financial principles that govern the free enterprise system.*

- C. The student applies business, economic, and financial principles to understand and manage his/her role in the business world.
 1. Uses a variety of technologies to (CLAS 27) develop a presentation by using clear research questions and creative and critical research strategies (CLAS 28) to explain the role of business in society (NSME–BA:001).
 2. Accurately interprets information presented in technical formats (CLAS 18) to compare and contrast the types of economic systems (NSME–EC:007; CS–V.2).
 3. Examine texts to develop an informed opinion (CLAS 11) to describe types of business activities (NSME–BA:002).
 4. Develops a presentation by using clear research questions and creative and critical research strategies (CLAS 28) to explain key concepts (e.g., GDP, organized labor) (NSME–EC:015, 017).
 5. Synthesizes and organizes information from a variety of sources (CLAS 19) to determine factors affecting business risk (NSME–EC:011).
 6. Determines the impact of business cycles on business activities (NSME–EC:018) and represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs (CMS 6).
 7. Uses appropriate technologies to collect, analyze, and communicate data (CSS 3) that shows the impact of specialization/division of labor on productivity (NSME–EC:014).
 8. Interprets business policies to customer/clients (NSME–IS:014).
 9. Expresses an informed opinion that clearly states a personal view, is logical and coherent, and engages the readers interest (CLAS 25) to explain the purpose and importance of credit (NSME–FI:002).
 10. Demonstrates control of grammar, paragraph and sentence structure, diction, and syntax (CLAS 20) to explain the nature of international trade (NSME–EC:016).
 11. Analyzes arguments, concepts, and perspectives (CLAS 31) to identify factors that affect a business’s profit (NSME–EC:010).
 12. Composes written arguments that develop and support an informed opinion (CLAS 30) to explain the concept of management (NSME–MB:002).
 13. Manages diversity in the workplace (CR–5C).
 14. Identifies complex, implicit hierarchic structures in informational texts and relationships between the concepts and details in these structures (NBEA; CS–II.5).
 15. Reads critically and independently to draw conclusions from research (NBEA; CS–II.9).

STRAND IV: MARKETING CONCEPTS

CONTENT STANDARD: *The student identifies the roles of marketing and analyzes the impact of marketing on the individual, business, and society.*

The student explores the process of developing, promoting, and distributing products to satisfy customers’ needs and wants.

1. Explains the concept of market and market identification (NSME–IM: 196).

2. Explains the concept of product mix (NSME–PM:003).
3. Designs and conducts a scientific investigation (CSS 2) to select promotional media (NSME–PR:010).

STRAND V: COMPUTER APPLICATIONS

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

- E. The student demonstrates basic word processing, spreadsheet, and presentation software skills.
 1. Identifies, accesses, navigates, and uses online services (CR–3D; BST).
 2. Demonstrates knowledge of advanced computer operations (e.g., word processing, spreadsheets, and multimedia presentations) (CR–3B; BST).
 3. Follows ethical guidelines for telecommunications (CLAS 10)(CR–4C).
 4. Cites sources of all types of data (CR–3D).
 5. Demonstrates proficiency in using a variety of technology (e.g., word processors, overhead projectors, multimedia) to present information appropriate for the intended purpose and audience (CS–III.3).

Business, Marketing, & Finance II

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: CAREER INTERESTS AND APTITUDES

CONTENT STANDARD: *The student identifies potential career interests and aptitudes which support personal career goals and lifelong learning.*

1–4. The student utilizes the Internet to locate the Keirsey Temperament Survey. The student completes the survey, analyzes the results, and uses the findings to prepare a multimedia presentation to the class. Clip art images, animation, preset effects, and the following slide requirements must be included. Additional project requirements are as follows:

- identification of the individual's temperament type
- identification of three famous people that exhibit the individual's temperament type
- description of five characteristics or qualities exhibited by the identified temperament
- examples (a minimum of five) from the student's life that demonstrate why this temperament type best describes himself/herself
- reasons why the individual will succeed in business and/or school because of the awareness of the temperament type

The student is assessed by a rubric tool that has been discussed with him/her before the start of the project.

- ✓ adherence to rubric
- ✓ inclusion of all required components
- ✓ creativity
- ✓ adherence to deadlines
- ✓ writing conventions (e.g., grammar, punctuation, spelling)
- ✓ efficient use of time allowed to work on project

STRAND II: EMPLOYABILITY SKILLS

CONTENT STANDARD: *The student develops skills necessary to find and maintain employment.*

1. The student assesses a current ethical situation in the business world (e.g., using newspapers, magazines, Internet), critiques the situation based on the “5P’s” of ethical management (from *The Power of Ethical Management*), and reports the findings orally to the class.

- ✓ understanding of ethical practices

2. The student completes the ACT WorkKeys “teamwork” assessment to determine his/her teamwork performance rating compared to the skill level requirements needed for an identified occupation of interest to the student. The student receives a personalized printout indicating the student's a) current teamwork skill level, b) skill level required by the desired occupation, and c) suggestions for improving deficiencies.

2, 4–6. The student identifies the steps in the group process and the characteristics of an effective work team. He/She then evaluates an existing personal team membership (e.g., snack bar, extracurricular activities, workplace) and prepares a written synopsis including the following information: a) a description of the team, b) the existing stage of group development (justified with supporting detail), and c) effective

work team characteristics exhibited by the team (justified with supporting detail). The student then presents this information orally to the class.

- ✓ analysis
- ✓ writing conventions
- ✓ effective presentation
- ✓ supporting argument

3, 7, 8. The most common customer objections are based upon the five buying decisions of need, product, source, price, and time. Reflecting on his/her proposed business, the student a) provides three specific objections he/she expects to encounter from customers and b) selects a specialized method for handling each objection (e.g., boomerang, question, superior point, denial, demonstration, or third party). The student then writes a dialog describing the interaction between a salesperson and the customer.

- ✓ conflict resolution applications
- ✓ writing conventions

STRAND III: BUSINESS, ECONOMIC, AND FINANCIAL CONCEPTS

CONTENT STANDARD: *The student develops knowledge of business, economic, and financial principles that govern the free enterprise system.*

1, 15. The student continues the development of a fictional company, researches various components, applies this information to a proposed business, and presents the findings in a multimedia presentation to the class. One of the aspects required is a description of how the student's business is socially responsible to the community. Consideration is given to both short-term and long-term goals.

- ✓ understanding of responsibilities
- ✓ clarity
- ✓ effective presentation

2. The student selects a type of economic system other than a market economy. Relating to the student's fictional business, he/she explains how his/her company and role as owner would be different if they existed in that economy.

- ✓ contrasts in economies
- ✓ clarity
- ✓ understanding of economic systems

3. Using presentation software, the student develops an organizational chart illustrating the different business activities used in the student's fictional business.

- ✓ technology skills
- ✓ effective presentation
- ✓ organization

4. The student reviews a variety of business transactions and decides if the transaction amounts are or are not included in the calculation of gross domestic product (GDP). (Note: $GDP = C + I + G + F$)
 - C = personal consumption expenditures
 - I = gross private domestic investment
 - G = government purchases of goods and services
 - F = net exports of goods and services
 - ✓ understanding of concepts
 - ✓ accurate determinations
5. The student learns that economic risks are caused by changes in overall business conditions. These changes can include the amount or type of competition, changing consumer lifestyles, population changes, limited usefulness or stylishness of some products, product obsolescence, government regulations, inflation, or recession. Natural risks are risks caused by natural causes. Based on that information the student, through group/class discussion or written format, answers the following questions:
 - What economic risks will your business face? Why?
 - Of the economic risks facing your company, which economic risk would have the greatest impact on the loss or failure of your business? Why?
 - What will your business do to protect itself against natural risks?
 - ✓ comprehension
 - ✓ individual participation
 - ✓ clarity in communication
6. The student is provided a list of business activities and must associate each activity with a phase of the business cycle (e.g., peak, trough, expansion, contraction). Business activities may include:
 - full employment with some labor shortages
 - demand for goods begin to fall
 - profits begin to decrease
 - production is at its maximum
 - investment begins to increase
 - unemployment is very high
 - people start to feel good about business activities
 - correct identification of phase with activity
7. The class is divided into four groups to play “Specialization Jeopardy”. Each group selects a spokesperson to represent the group when selecting categories and providing answers. Four categories (i.e., Resources, Advantages, Disadvantages, Combating Advantages) are used along with varying dollar amounts (depending upon the difficulty of the questions). The first team to correctly provide “the question” (Note: “the answer” is supplied by the teacher) is awarded the corresponding dollar value and the option of choosing the next category.

Examples of appropriate questions could include:

- What is increased interdependency?
- What is a decrease in pride of work?
- What are morale and enthusiasm on the job?
- What are natural resources?
- What is specialization by trade or profession?
- What is increased level of skill?
- What is job enrichment?

8, 9, 13. The student develops written business policies for his/her fictional business. Possible business policies include:

Product Policy	Attendance Policy
Service Policy	Dress Policy
Credit Policy	Driving Policy
Price Policy	Employee Evaluation Policy

- ✓ writing conventions
- ✓ clarity
- ✓ reasonableness
- ✓ relevance

10, 14, 15. The student researches trade agreements between two of the following countries: Japan, China, Mexico, India, the United States, France, and Switzerland. The student then determines the number and kinds of imports, exports, and trade restrictions.

- ✓ understanding of international trade

11. The student expands his/her financial knowledge by preparing a fictional Income Statement for his/her fictional company. Profit is determined by computing revenue, cost of goods sold, and expenses.

- ✓ business acumen

12, 14. Selecting a manager from *The Little Book of Business Wisdom*, the student researches this individual (e.g., books, magazines, websites) to prepare a summary of the manager's biographical information, business beliefs, interesting trivia, and how the information learned can be applied at school or at work. The student uses these findings to prepare a multimedia presentation to the class. Clip art images, animation, and preset effects are also required. The student is assessed by a rubric tool that has been discussed with him/her prior to the start of the project.

- ✓ creativity
- ✓ adherence to rubric
- ✓ deadlines met
- ✓ all required components

- ✓ effective presentation
- ✓ technology
- ✓ writing conventions

NOTE: The student can earn extra points if he/she invites a guest (approved), sends that guest a typed invitation, and that guest actually attends the presentation.

STRAND IV: MARKETING CONCEPTS

CONTENT STANDARD: *The student identifies the roles of marketing and analyzes the impact of marketing on the individual, business, and society.*

- 1–3. The student continues to apply information learned to his/her fictional company including: a) predicting who purchases the product or service (e.g., market identification based on a customer's income, age range, gender, educational level, life stage, and occupation); b) determining where the customer lives geographically (i.e., local, regional, state, nationally); c) describing the psychographics of the customer (e.g., lifestyle, attitudes, values); d) describing the major goods or services provided by the company; and e) describing and providing a sample of the specific forms of promotional media that are utilized.
- ✓ inclusion of all criteria
 - ✓ clarity of information presented
 - ✓ comprehension

STRAND V: COMPUTER APPLICATIONS

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

- 1–5. Throughout the previous strands, the student is required to make multiple presentations. The student demonstrates technological competence and ethical behavior in each presentation in order to be effective and to complete all the required components, thus meeting all of the performance standards in this strand. (See Strands I–IV).
- ✓ technology
 - ✓ ethical considerations
 - ✓ proper source citations

E-Commerce: A Multimedia Approach

Pathway Standards

In this course the student studies various electronic marketing tools. Web business concepts are developed through research, design, and construction using a variety of programming languages (e.g., HTML, Java). The course provides an in-depth analysis of the impact that the Internet has on marketing functions and foundations and facilitates the student's understanding of software and Internet capabilities, providing opportunities to develop web sites for selling goods/services/ideas. The student works with general marketing and economic strategies to build and integrate a shopping cart and other business needs on a fire walled web server in order to maximize return and meet customer expectations with electronic purchases. The student learns about business principles of e-commerce, personal and business services online, buying online, doing business on the web, and developing an e-commerce web site. This course integrates reading, speaking, writing, and research through the use of business concepts, presentations, and computer technology. The student designs, writes, and produces computer-based multimedia projects.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), New Mexico Social Studies Standards (SS), Marketing Education Resource Learning Activity Packages (BA–Business Administration; DS–Distribution; EC–Economics; IM–Information Management; MB–Marketing and Business; PD–Professional Development; PI–Product Information; PM–Product Management; PR–Promotion; SE–Selling), and National Educational Technology Standards for Students (NETS).

STRAND I: BUSINESS PRINCIPLES OF ELECTRONIC COMMERCE

CONTENT STANDARD: *The student understands the basic principles of marketing and business as they apply to e-commerce.*

- A. The student A) applies the four P's (i.e., Product, Price, Place, Promotion) of marketing and B) understands types of business ownership and organization (e.g., sole proprietorship, partnership, corporation, franchises, and metasites) in e-commerce.
 1. Accurately interprets information from and detects inconsistencies in a variety of informational, literary, and technical texts (CLAS 17) to explain the role of business in society (SS IV-B; BA-001).
 2. Synthesizes and organizes information from a variety of sources (CLAS 19) to define types of business ownership (SS IV-B.12; MB-007).
 3. Uses a variety of technology tools to present information (CLAS 27) and explain the nature of retailing (SS IV-A.7; BA-061).
 4. Develops a presentation by using clear research questions (CLAS 28) to describe the impact of the Internet on marketing (CR 3-A; SS IV-B.8; BA-210, 003).
 5. Expresses an informed opinion that states a personal view and is logical and coherent (CLAS 25) to explain the nature of e-commerce (CR 3-A; BA-209).
 6. Synthesizes and organizes information from a variety of sources (CLAS 19) to describe the unique aspects of Internet sales (SE-302).
 7. Demonstrates proficiency in accessing and sending information electronically (CLAS 10) (CR-1D, E, 3D; BA-214).
 8. Describes the essential components of an investigation, including appropriate methodologies, proper equipment, and safety precautions (CSS 1) to explain the nature of e-mail marketing (PR-013, 014, 165).
 9. Evaluates the information, explanations, or ideas of others by identifying clear, reasonable criteria (CLAS 7) to describe the nature of online advertisements (SS IV-A.5; PR-016, 164).

10. Uses multiple resources to gather information to examine cause and effect relationships (CLAS 8) that explain Internet pricing models and the impact of the Internet on pricing (PI-042, 043)
11. Synthesizes a variety of types of visual information, including pictures and symbols, (CLAS 6) to describe sales-promotion techniques for e-commerce (PR-169).

STRAND II: PERSONAL AND BUSINESS SERVICES ONLINE

CONTENT STANDARD: *The student utilizes the Internet to locate information on careers, personal finance, and information services.*

- B. The student A) defines a career pathway based on information found on the Internet, B) understands the basic personal finance issues (e.g., banking, insurance, financing) and C) accesses appropriate sites to obtain information about personal services (e.g., news, travel, weather, government).
 1. Demonstrates basic search skills on the web (CR-1D, E, 3C, D;BA-035).
 2. Uses a variety of techniques for researching topics including summarizing, cross referencing, and use of interactive technologies (CLAS 5) to investigate employment opportunities in e-commerce (CR-1A, C, 3C; SS IV-A.9; PD-003, 065).
 3. Searches for appropriate job listings (CR-1A, C; SS IV-A.9).
 4. Locates career planning information (CR-1A, C, 3C).
 5. Prepares and posts an electronic résumé (CR-1D, E, 3B, D).
 6. Accesses online banking and financial institution sites (CR-1B, D, E, 3D; SS IV-A.13).
 7. Investigates online sources of insurance information (CR-1B, D, E, 3D).
 8. Accesses information on filing taxes electronically (CR-1B, D, E, 3D).
 9. Researches information providers for reference and location services (CR-1D, E, 3D).

STRAND III: BUYING ONLINE

CONTENT STANDARD: *The student becomes a wise online consumer by understanding issues related to online buying (e.g., web site evaluation, bidding, comparison shopping, purchasing, security, and privacy).*

- C. The student A) navigates e-commerce web sites, manages his/her shopping cart, and "purchases" a product and B) demonstrates an understanding of security and privacy issues when shopping online.
 1. Researches, defines, presents (CLAS 16) and explains the impact of the Internet on purchasing (SS IV-B.8; BA-210).
 2. Evaluates the influence of technology on society (CSS 9) by describing the economic impact of e-commerce (SS IV-B.8; EC-063).
 3. Locates shopping services and online malls to make purchases (CR-1B, E, 3D).
 4. Describes the types of ordering, payment, and delivery information for online purchases (CR 1B, E, 3D; SS IV-B.8; BA-073).
 5. Reads critically and independently to draw conclusions (CLAS 21) and identifies strategies for protecting customer transactions (CR-3B, D; BA-223).
 6. Analyzes arguments, concepts, and perspectives presented (CLAS 31) in technical documents to understand and evaluate the security and privacy of Internet sites (CR-3B, D).
 7. Participates in online auctions (CR-3D).

STRAND IV: DOING BUSINESS ON THE WEB

CONTENT STANDARD: *The student understands the e-commerce selling process (i.e., taking orders, shopping carts, delivery of products, post sale).*

- D. The student utilizes presale techniques, applies shopping cart principles, understands the delivery process, and develops a post sale

plan.

1. Develops a business plan (CR-1B, 2C, 3B) that demonstrates control of grammar, paragraph, and sentence structure (CLAS 20).
2. Accesses product comparison and safety information online (CR-1E, 3D; SS IV-A.10).
3. Makes a well-informed and well-organized formal presentation with a clear main point, adjusting the message, wording, and delivery to a particular audience and context (CLAS 29) that describes how to sell a product through online catalogs and order systems (CR-1B, 3A, B, D).
4. Develops a system of ordering products (e.g., shopping cart) (CR-1B, 3B, D).
5. Fulfills orders (CR-1B, E, 3B-D; DS-088).
6. Uses a variety of technology tools to present information (CLAS 27) that explains the nature of inventory control systems (CR-1B, 3B, D; DS-002, 019).
7. Identifies data available through online tracking methods (CR-3A, B, D; IM-229).
8. Reads critically and independently to draw conclusions (CLAS 21) and describes the delivery and tracking of online purchases (CR-3A, B, D).
9. Develops and maintains a customer database (CR-3A, B, D; IM-231, 232).
10. Uses language persuasively (CLAS 15) to describe the nature of customer support for online sales (SE-303).

STRAND V: DEVELOPING AN ELECTRONIC COMMERCE WEB SITE

CONTENT STANDARD: *The student implements web-site design processes.*

- E. The student A) plans, constructs, tests for feasibility, evaluates, and maintains an e-commerce web site and B) understands the legal and ethical considerations of doing business on the web.
 1. Effectively uses a variety of interactive technologies to enhance understanding (CLAS 23) and explains the various components of a basic web site (CR-1E, 3B, D).
 2. Identifies characteristics of good web sites (CR-1E, 3B, D).
 3. Composes written arguments that develop and support an informed opinion (CLAS 30) that articulate the principles of good web design (CR-1E, 3B, D).
 4. Identifies strategies for planning a web site (CR-1E, 3B, D; PR-015).
 5. Uses an array of media and technologies to examine, comprehend (CLAS 24) and describe tools used in web-site creation (CR-1E, 3B, D; BA-218).
 6. Demonstrates control of grammar, paragraph and sentence structure, diction, and syntax (CLAS 20) to explain the nature of merchandise plans (PM-061).
 7. Researches domain name registration (CR-1E, 3B, D).
 8. Creates and posts basic web page (CR-1E, 3B, D; BA-217).
 9. Optimizes the placement of a business's web site with major search engines and directories (CR-1E, 3B, D; PM-116).
 10. Reads critically and independently (CLAS 21) to identify strategies for protecting a business web site (CR-1E, 3B, D; BA-004, 222).
 11. Maintains/updates a web site (CR-1E, 3B, D; PM-113).
 12. Identifies privacy and security issues regarding email and advertising (CR-1E, 3B, D; BA-005).
 13. Describes the issue of unwanted e-mail (i.e., spam) (CR-3B, D; BA-004, 005).
 14. Identifies and describes practices that are acceptable/not acceptable in web business (CR-4A, C; BA-005).
 15. Examines texts (CLAS 11) to identify the regulations affecting e-commerce (CR-1E, 4C, D; BA-005).

16. Explains the strategies for dealing with legal and ethical issues in e-commerce (CR-4C, D; BA-005; NETS – 4).

STRAND VI: MULTIMEDIA DESIGN

CONTENT STANDARD: *The student explores multimedia capabilities.*

- F. The student applies multimedia techniques to create a variety of projects.
1. Accurately interpret information from and detect inconsistencies in a variety of informational, literary, and technical texts (CLAS 17) to recognize the components of interactive multimedia (NETS–1, 7).
 2. Designs, develops, publishes, and presents an interactive multimedia project (NETS–5, 6).
 3. Collaborates with others to produce a finished multimedia project (NETS–7, 10).
 4. Uses technology tools and resources to create content, manage, or communicate ideas or concepts (NETS–2, 5, 8, 9).
 5. Develops skills key to desktop publishing (NETS–4, 5, 7, 8).
 - design
 - inserting and editing graphics
 - typography
 - handling multicolumn documents
 - creating styles and charts
 - numerical information
 - drawing tools
 - special effects

E-Commerce: A Multimedia Approach

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: BUSINESS PRINCIPLES OF ELECTRONIC COMMERCE

CONTENT STANDARD: *The student understands the basic principles of marketing and business as they apply to e-commerce.*

1. The student gives examples of local businesses that give back to the community through sponsorships, donations, etc.
2. The student defines and gives examples of a partnership, proprietorship, and corporation.
- 3–6. Using a graphic organizer (e.g., Venn diagram), the student compares and contrasts a traditional brick-and-mortar business to an Internet business.
 - ✓ personal selling versus self service
 - ✓ ease of startup between traditional and Internet company
 - ✓ differences in type of work ethic
 - ✓ accuracy
 - ✓ thoroughness
7. The student writes an e-mail advertisement using key attention-getting phrases (e.g., free, huge discount, bonuses).
 - ✓ eye appeal
 - ✓ writing conventions
- 8–11. Using PowerPoint, the student designs an advertisement to show what product/service he/she is offering and explains to the class how the advertisement helps sell the product/service.
 - ✓ variety of links
 - ✓ circuitous navigation
 - ✓ attention-getting format

STRAND II: PERSONAL AND BUSINESS SERVICES ONLINE

CONTENT STANDARD: *The student utilizes the Internet to locate information on careers, personal finance, and information services.*

- 1–4. The student uses the Internet to locate information pertaining to careers in e-commerce (e.g., web designer). He/She then chooses a specific career to research, later joining a group of students who researched a similar career. After each member of the group shares information located, the student participates in preparing a class presentation (e.g., PowerPoint, paper) that describes the career, the skills necessary, future opportunities in the field, and entry salary.
 - ✓ citation of sources
 - ✓ accuracy

- ✓ appropriate presentation skills
- ✓ individual participation

5. The student uses *resumemaker.com* or a similar program to prepare and post a current résumé.

6, 7. The student uses the Internet to locate sites that compare both short and long term rates for at least 10 financial institutions and insurance companies. He/She uses the data to prepare a chart showing the ranges in the rates.

8. The student uses his/her W-2 forms to file taxes online.

- ✓ accuracy

9. As part of a group, the student chooses a location to “visit.” Each group member chooses one of the following topics to research: roundtrip airfare, accommodations, weather conditions, and applicable news. The research is presented in the form of a travel brochure.

- ✓ eye appeal
- ✓ accuracy
- ✓ writing conventions
- ✓ individual participation

STRAND III: BUYING ONLINE

CONTENT STANDARD: *The student becomes a wise online consumer by understanding issues related to online buying (e.g., web site evaluation, bidding, comparison shopping, purchasing, security, and privacy).*

1, 2. The student prepares a graphic representation (e.g., chart, graph) that depicts the correlation between the rise of Internet sales and the decline of traditional retail sales.

- ✓ organization of information

3, 4, 7. Using a search engine to locate at least four online auction sites that offer a specific product, the student produces a graphic representation (e.g., flowchart, spreadsheet) that describes the voyage of a product from producer to consumer.

- ✓ accuracy
- ✓ thoroughness
- ✓ visual effectiveness

5, 6. After the student reads an article on web security, he/she searches for and makes note of at least five Internet sites that use encryption methods and at least five sites without encryption methods. He/She produces a presentation that describes why encryption is/is not used at the various sites.

- ✓ logic
- ✓ clear explanation

STRAND IV: DOING BUSINESS ON THE WEB

CONTENT STANDARD: *The student understands the e-commerce selling process (i.e., taking orders, shopping carts, delivery of products, post sale).*

- 1–9. Using *nebs.com*, or a similar business planning tool, the student, as part of a small group, develops a business plan for a specific product. Part of the business plan is the design and development of a web site for the business. Each student in the group “becomes” the head of one department (e.g., inventory control, ordering system, customer support). For the final presentation, the web site and how it works is demonstrated. The members of the group role play the entire process the company goes through from the ordering of the product by a customer to the final “How did we do?” questionnaire, describing how his/her department is impacted by the order (e.g., When an order is received/returned, the inventory control must make appropriate adjustments.).
 - ✓ description of each step in the process
 - ✓ clear explanation of process
 - ✓ thoroughness
 - ✓ acceptable presentation skills
 - ✓ interesting web design
10. As part of a pair, the student designs and role plays a customer service phone system. The student role plays both the customer calling in with a problem and the customer service representative.
 - ✓ effective communication skills
 - ✓ logical problem solving
 - ✓ appropriate solutions

STRAND V: DEVELOPING AN ELECTRONIC COMMERCE WEB SITE

CONTENT STANDARD: *The student implements web-site design processes.*

- 1, 2. The student researches the components of a web site and makes a vocabulary/term list. He/She uses these terms to create a crossword puzzle on a grid sheet. The student becomes part of a team that competes in a password-type game that uses the definitions of the above-mentioned terms.
 - ✓ accuracy
 - ✓ thoroughness
 - ✓ teamwork
- 3, 4. The student designs a web-site plan, creating a story board for each page, and describes the graphics, headlines, links, etc. and how each will work.
 - ✓ all components visible
 - ✓ descriptions clear
- 5, 8, 11. The student uses the web-site design software “Edit Plus” to build a basic web-site that includes titles, backgrounds, graphics, animation, pictures, and text information.
 - ✓ all components present
 - ✓ appealing presentation

6. The student writes a merchandise plan for his/her web site, demonstrating the differences and similarities between merchandising for e-commerce and brick and mortar business.
 - ✓ accurate comparisons
7. The student searches the Internet to find sites for domain registration and the costs involved. He/She writes a summary on findings.
 - ✓ thoroughness
 - ✓ accuracy
 - ✓ writing conventions
9. After searching the Internet for information on search engines (e.g., Yahoo, MSN, Google), the student lists the costs and services provided by each.
 - ✓ variety in search engines
 - ✓ accurate information
- 10 – 13. The student develops a list of e-commerce protection measures that may include, but are not restricted to, the following: firewalls, virus protection, e-mail filters, passwords, authentication, authorization, SSL, SET, and digital certification. Using this list as a reference, the student develops a plan of attack against web-site hackers and the criminal use of the web site.
 - ✓ thoroughness of list
 - ✓ logical plan
 - ✓ effectiveness of plan
- 14, 15. The student uses the Internet to research the following cyber laws:
 - a. Electronic Signatures in Global National Commerce Act of 2000
 - b. Child Online Protection Act of 2000
 - c. Anticybersquatting Consumer Protection act of 1999
 - d. Internet Tax freedom Act of 1998
 - e. Digital Millennium Copyright Act of 1998

After each law is researched, the student becomes part of a small group which selects one cyber law on which to make a presentation.

- ✓ individual participation
- ✓ accurate information
- ✓ thoroughness
- ✓ presentation skills

15. The student uses a graphic organizer to depict the laws that apply to both e-commerce and brick and mortar businesses.
 - ✓ appropriate organizer
 - ✓ accuracy

OR

After researching, listing, and describing the intent of cyber law, the student creates a matching diagram/exercise for each of the laws and regulations that apply to web sites.

- ✓ thoroughness
- ✓ accuracy

15, 16. As part of a team, the student plays “Legal Jeopardy,” using questions and answers learned while researching cyber law.

- ✓ participation
- ✓ accuracy

STRAND VI: MULTIMEDIA DESIGN

CONTENT STANDARD: *The student explores multimedia capabilities.*

1. The student creates a portfolio that includes examples of each multimedia component. For each example the student provides a description, file size, file type, and source of the media. The portfolio is assessed using a rubric that has been designed by both student and instructor.
 - ✓ all required components
 - ✓ variety of examples
 - ✓ effective communication
 - ✓ quality product
 - ✓ adherence to rubric
2. The student selects a project topic, designs a map or storyboard for the topic, creates the necessary graphics for it, develops sound or music, creates an animation, tests the product, presents the product, evaluates the results, and packages the final project for dissemination.
 - ✓ completion of all required components
 - ✓ analysis
 - ✓ effective presentation
 - ✓ quality project
3. The student, working in small groups, brainstorms ideas for a project to include areas of specialty (e.g., graphics, sound, content) and presents to the class. Once the group reaches agreement on the project, team roles and norms are defined, jobs are carried out, and the finished project is presented to the class. After presentation, the group evaluates the team process and the effectiveness of the presentation.
 - ✓ collaboration and cooperation
 - ✓ appropriate behaviors
 - ✓ audience response
 - ✓ individual participation
 - ✓ assessment
 - ✓ effective presentation
 - ✓ quality product
 - ✓ multimedia components
4. The student, working alone or in a small group, writes a project using a selected multimedia package. He/She uses appropriate software to create original digital art, music/sound, animation or graphics, and designs logic structures to handle user interaction.

OR

The student designs an electronic portfolio that showcases examples of both creative as well as examples of work created in other areas of study (e.g., language arts, math, social studies).

- ✓ originality
- ✓ all required components
- ✓ appropriate software
- ✓ technological skills
- ✓ connections
- ✓ quality product
- ✓ effective communication

5. The student creates a portfolio of business documents to include an ad, a drawing, a letterhead template, a business letter, a fax cover sheet with a memo, and a newsletter. The student may select to include other documents.

- ✓ variety of documents
- ✓ evidence of desktop publishing skills
- ✓ quality product
- ✓ creativity
- ✓ effective writing elements

Accounting I

Pathway Standards

Accounting I is an introductory course in which the student learns the fundamentals of the complete double-entry accounting cycle. The student also learns basic accounting computer applications and the basics for setting up an accounting system for a single proprietorship, a partnership, and a corporation. The student learns about communication, application and computation, ethics, technology, and careers in accounting.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), New Mexico Social Studies Standards (SS), and the National Standards for Business Education (NSBE).

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student acquires and uses accounting terminology and skills throughout the study of accounting.*

- A. The student completes and explains the purpose of simple steps in the accounting cycle and responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas and supporting details (CLAS 4).
 - 1. Defines accounting and explains the purpose of an accounting system (NSBE-1A).
 - 2. Defines accounting terminology and generally accepted accounting principles (NSBE-1B).
 - 3. Identifies banking vocabulary and specific details of business-related banking (SS-4A.13; NSBE-2).
 - 4. Recognizes forms of business ownership (e.g., sole proprietorship, partnership, corporation) (SS-4B.12; NSBE-4A.I).
 - 5. Identifies types of businesses (e.g., service, merchandising, manufacturing) (SS-4B; NSBE-3).

STRAND II: APPLICATION AND COMPUTATION OF ACCOUNTING ELEMENTS

CONTENT STANDARD: *The student applies generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity.*

- B. The student lists and identifies characteristics of the three basic accounting equation elements and their impact on financial statements.
 - 1. Classifies items as assets, liabilities, and owner's equity accounts (SS-4B; NSBE-2A, B, C).
 - 2. Creates responses that evaluate problems and offer solutions (CLAS 3) when explaining why the accounting equation must be in balance (NSBE-1C).
 - 3. Uses mathematical models to (CSS 8) demonstrate the theory of debit and credit to increase and decrease accounts and the resulting changes that occur in the accounting equation (NSBE-1G).
 - 4. Defines a business transaction (SS-4B.12; NSBE-1F).
 - 5. Identifies special journals (e.g., multicolumn, cash payments, purchases, cash receipts) (NSBE-1H).
 - 6. Journalizes transactions using various journal formats (NSBE-1H).
 - 7. Identifies and uses source documents for journalizing transactions (NSBE-1H).
 - 8. Uses worksheets as a source document to journalize adjusting and closing entries (NSBE-1F, N, O).
 - 9. Evaluates problems and offer solutions to a reader or listener (CLAS 3) when explaining the purpose of ledger accounts (NSBE-1J).
 - 10. Posts journal entries to appropriate ledgers (NSBE-1J).
 - 11. Explains the need for post-referencing in accounting (NSBE-1M) by creating responses that evaluate problems and offer solutions

- to a reader or listener (CLAS 3).
- 12. Uses an audit trail to trace transactions (NSBE-1N).
- 13. Identifies basic accounts that require adjusting and closing entries (NSBE-1L, O).
- 14. Determines temporary and permanent accounts (NSBE-1E).
- 15. Describes and uses appropriate computational methods for locating and adjusting errors (CMS 1, 7)(NSBE-1K, L, M).
- 16. Identifies cash control techniques (e.g., cash, bank reconciliation, petty cash) (NSBE-2A.1).

STRAND III: ETHICS

CONTENT STANDARD: *The student develops and demonstrates responsible, ethical, and professional behavior.*

- C. The student identifies positive behavior, conduct, and social patterns.
 - 1. Develops business ethics (CR-4A; NSBE-3E).
 - 2. Recognizes the importance of clear and accurate work (CR-1D, E, 4A).
 - 3. Identifies appropriate legal behaviors related to accounting practices (CR-4C).
 - 4. Follows school and classroom rules, policies, and procedures (CR-4A).

STRAND IV: TECHNOLOGY

CONTENT STANDARD: *The student uses technology to complete the accounting process.*

- D. The student becomes familiar with automated accounting or becomes calculator proficient if computers are not available.
 - 1. Describes the differences between manual and computerized accounting systems (CR-3; NSBE-3) through responses that evaluate problems and offer solutions to a reader or listener (CLAS 3).
 - 2. Uses a variety of computational methods to estimate quantities involving real numbers (CMS 1, 7) and demonstrates basic math functions on the computer or calculator (CR-3; NSBE-3).
 - 3. Identifies the computer or calculator as a tool for verification of work (CR-3; NSBE-3).
 - 4. Accurately interprets information presented in professional and technical documents (CLAS 18) to identify types of computer and application software available in the marketplace (CR-3; NSBE-3).
 - 5. Creates multiple displays of data to explore (CSS 7) spreadsheet software to maintain accounting records (CR-3; NSBE-3C, D).
 - 6. Explores Internet web sites for accounting purposes (CR-3A, C).

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies, demonstrates, and evaluates skills that prepare him/her for success in the workplace.*

- E. The student identifies jobs available in the accounting pathway.
 - 1. Demonstrates skills for entry into postsecondary education or chosen career (CR-1E, 3B, D, 4A-D, 5A-F)
 - 2. Uses multiple resources to gather information, evaluate problems, examine cause and effect relationships, and answer research questions (CLAS 8) to develop critical thinking and problem-solving skills (CR-5E).
 - 3. Develops team building skills to enhance cooperative learning and interpersonal skills (CR-2B, 4B, 5C, D).
 - 4. Synthesizes and organizes information from a variety of sources (CLAS 19) to identify accounting careers (CR-1).

Accounting I

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student acquires and uses accounting terminology and skills throughout the study of accounting.*

- 1–3. When given a hypothetical business, the student prepares forms and reports that accurately reflect the business's standing for specified accounting periods.
 - ✓ accuracy
 - ✓ correct account titles and classifications
 - ✓ correct format
- 4, 5. The student names and defines three sole proprietorships, partnerships, and corporations, giving examples of each and the type of business each performs.
 - ✓ accuracy

STRAND II: APPLICATION AND COMPUTATION OF ACCOUNTING ELEMENTS

CONTENT STANDARD: *The student applies generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity.*

- 1–4. The student uses a source document to prepare T-accounts to record transactions that show increases and decreases in assets, liabilities, and owner's equity accounts.
 - ✓ accuracy
 - ✓ correct account titles
 - ✓ equal debits and credits
- 5–7, 9–12. The student uses different journal formats to record various business transactions, posting information to appropriate ledgers and using correct post references, and uses the audit trail to trace a transaction.
 - ✓ accuracy
 - ✓ account titles
 - ✓ journal entries
 - ✓ ledger entries
 - ✓ accurate post referencing
 - ✓ accounts in balance

- 8, 13–15. The student prepares a worksheet using ledgers, determines temporary and permanent accounts, and decides what accounts need to be adjusted or closed.
- ✓ accuracy
 - ✓ trial balance correct
 - ✓ adjustments calculated correctly
 - ✓ correct financial statements
16. Using a bank statement, the student prepares reconciliation documents.
- ✓ accuracy

STRAND III: ETHICS

CONTENT STANDARD: *The student develops and demonstrates responsible, ethical, and professional behavior.*

- 1–3. The student uses ethical accounting methods to correct errors.
- ✓ no liquid paper or erasures
 - ✓ legible correction
- 2, 3. After looking at examples of applicable case studies to understand the importance of high ethical standards in accounting, the student becomes part of a small group. Each group writes and presents a scenario involving accounting practices. The class discusses whether the practices presented are ethical.
- ✓ ethical behaviors
 - ✓ team work
4. The student comes to class on time, is prepared to work, and demonstrates on-task behaviors.
- ✓ consistent practices
 - ✓ adherence to behavior and work guidelines

STRAND IV: TECHNOLOGY

CONTENT STANDARD: *The student uses technology to complete the accounting process.*

- 1–5. The student prepares ledger accounts, rules journals, balances check - books, reconciles bank statements, replenishes petty cash fund, proves cash, and computes net loss or net income using both manual and applicable software.
- ✓ accuracy
 - ✓ correct computation
 - ✓ correct ledger accounts
 - ✓ journals balanced and ruled
 - ✓ prove cash with ledger account and bank statement
 - ✓ operations performed both manually and with appropriate software
6. The student locates a variety of companies' financial reports on the Internet and writes a summary of his/her findings.
- ✓ clarity
 - ✓ writing conventions

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies, demonstrates, and evaluates skills that prepare him/her for success in the workplace.*

1. Throughout the year when guest speakers discuss careers in the accounting field, the student takes notes on the various entry requirements necessary.
 - ✓ identification of skills
2. The student identifies accounting errors and uses source documents and proper accounting procedures to correct discrepancies and update reports.
 - ✓ accuracy
 - ✓ problem-solving techniques
3. As part of a team, the student prepares financial reports.
 - ✓ cooperation and collaboration
4. The student prepares a list of a minimum of five different levels of accounting occupations (e.g., bookkeeper, payroll accountant, auditor).

Accounting II

Pathway Standards

Accounting II emphasizes corporate accounting and provides the transition from manual accounting principles to a computerized accounting system that includes computerized journal and ledger initiation, spreadsheets, and chart applications. The student learns communication, application and computation, ethics, technology, and careers related to accounting.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), New Mexico Social Studies Standards (SS), and the National Standards for Business Education (NSBE).

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student acquires and uses accounting terminology and skills throughout the study of accounting.*

A. The student completes and explains the purpose of multifaceted steps in the accounting cycle.

1. Uses appropriate accounting terminology and generally accepted accounting principles effectively (NSBE-1B).
2. Reads critically and independently (CLAS 14) to research and explain forms of business ownership (e.g., sole proprietorship, partnership, corporation) (SS-4B.12; NSBE-4A.1).
3. Synthesizes and organizes information from a variety of sources (CLAS 19) to describe types of businesses (e.g., service, merchandising, manufacturing) (SS-4B; NSBE-3).

STRAND II: APPLICATION AND COMPUTATION OF ACCOUNTING ELEMENTS

CONTENT STANDARD: *The student applies generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity.*

B. The student defines current and long-term assets, short- and long-term liabilities, capital stock, and retained earnings accounts and their impact on financial statements.

1. Compares and draws conclusions between two or more sets of univariate data (CMS 18) to analyze and use source documents for journalizing transactions (NSBE-1H).
2. Represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs (CMS 6) when using special journals (e.g., multicolumn, cash payments, purchases, cash receipts) (NSBE-1H).
3. Explains and maintains accounts for short- and long-term liabilities (NSBE-2B.1).
4. Uses basic spreadsheet software to maintain accounting records (CR-3D; NSBE-1P).
5. Uses a variety of computational methods (CMS 1) to differentiate between and evaluates inventory concepts and costing procedures to merchandising and manufacturing (SS-4A.6; NSBE-2A.5).
6. Uses a variety of computational methods (CMS 1, 7) to compare various depreciation methods and their impact on financial statements (SS-4A.6; NSBE-2A.6).
7. Accurately interprets information presented in a technical format (CLAS 18) to compare and contrast effective amortization methods (NSBE-2A.8, .9).
8. Identifies complex accounts that require adjusting and closing entries (NSBE-1L, O).
9. Identifies capital stock and retained earnings accounts (NSBE-2C.2).

STRAND III: ETHICS

CONTENT STANDARD: *The student develops and demonstrates responsible, ethical, and professional behavior.*

- C. The student identifies positive behavior, conduct, and social patterns.
 - 1. Employs business ethics (CR-4A; NSBE-3E).
 - 2. Demonstrates clear and accurate work (CR-1D, E, 4A).
 - 3. Exhibits appropriate legal behaviors related to accounting practices (CR-4C).

STRAND IV: TECHNOLOGY

CONTENT STANDARD: *The student uses technology to complete the accounting process.*

- D. The student demonstrates technical knowledge of automated accounting or becomes calculator proficient if computers are not available.
 - 1. Identifies and applies measurement techniques and considers possible effects of measurement errors (CSS 4) to demonstrate the differences between manual and computerized accounting systems (CR-3; NSBE-3).
 - 2. Generates different representations to model a specific numerical relationship given one representation of data (CMS 5) and demonstrates the use of mathematical equations on the computer or calculator (CR-3; NSBE-3).
 - 3. Utilizes various types of computer and application software available in the marketplace (CR-3; NSBE-3) to create multiple displays of data to analyze and explain relationships (CSS 7).
 - 4. Uses spreadsheet and accounting software to maintain accounting records (CR-3; NSBE-3C, D) and identify and apply measurement techniques and consider the possible effects of measurement errors (CSS 4).
 - 5. Accesses Internet web sites for accounting applications (CR-3A, C).
 - 6. Evaluates the influence of technology on society (CSS 9) and explores technological advances and programs within the field of accounting (CR-3A, NSBE-3).

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies, demonstrates, and evaluates skills that prepare him/her for success in the workplace.*

- E. The student identifies jobs available in the accounting pathway.
 - 1. Demonstrates critical thinking and problem-solving skills (CR-5E).
 - 2. Models team building skills to enhance cooperative learning and interpersonal skills (CR-2B, 4B, 5C, D).
 - 3. Researches accounting careers (CR-3A, C).

Accounting II

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student acquires and uses accounting terminology and skills throughout the study of accounting.*

1–3. The student uses different types of accounting procedures and source documents as applicable for each type of business.

- ✓ accuracy
- ✓ correct vocabulary
- ✓ correct journal transaction

STRAND II: APPLICATION AND COMPUTATION OF ACCOUNTING ELEMENTS

CONTENT STANDARD: *The student applies generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity.*

1, 2. Given source documents, the student journalizes transactions correctly.

- ✓ correct journal
- ✓ correct debit and credit

3, 4. The student uses a spreadsheet or accounting software to maintain account records for short-term and long-term liabilities.

- ✓ correct account
- ✓ accuracy

5, 8. The student uses LIFO (i.e., Last In First Out) and/or FIFO (i.e., First In First Out) inventory methods for maintaining accounts.

- ✓ accurate computation
- ✓ correct adjustments

6. The student calculates depreciation and records the necessary transactions. He/She then prepares financial statements as needed.

- ✓ accuracy

7. The student identifies the positive and negative features of straight line amortization.

- ✓ identification of amortization features

9. The student explains the purpose of capital stock and retained earnings accounts and their use in a corporation.

- ✓ effective communication of ideas

STRAND III: ETHICS

CONTENT STANDARD: *The student develops and demonstrates responsible, ethical, and professional behavior.*

- 1–3. The student cites research that identifies at least one business that shows ethical accounting practices and one that shows unethical accounting practices, stating why the practices are ethical/unethical.
 - ✓ accurate information
 - ✓ sources cited
 - ✓ real-world business researched

STRAND IV: TECHNOLOGY

CONTENT STANDARD: *The student uses technology to complete the accounting process.*

1. The student keeps both manual and computerized records.
 - ✓ accuracy
- 2–4. The student prepares a variety of financial statements using the appropriate software and enters equations as needed.
 - ✓ accuracy
 - ✓ formatting
 - ✓ correct formulas
- 5, 6. The student prepares taxes using on-line applications.
 - ✓ accuracy
 - ✓ appropriate sites
 - ✓ technology skills

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies, demonstrates, and evaluates skills that prepare him/her for success in the workplace.*

- 1, 2. As part of a small group, each student assumes a different accounting role, performs his/her job, and then works in conjunction with the others to demonstrate the need for teamwork in an efficient, effective company.
 - ✓ individual participation
 - ✓ teamwork
 - ✓ problem-solving techniques
3. The student selects a local company to research, finding out who in the company performs jobs in the accounting field. The student contacts the person and arranges to interview/job shadow him/her. The student writes up a summary of experiences and shares it with the class.
 - ✓ appropriate person contacted
 - ✓ written summary
 - ✓ correct writing conventions
 - ✓ thoroughness
 - ✓ effective presentation skills

Accounting III

Pathway Standards

Accounting III provides practical applications of accounting skills learned in Accounting I and II. Wherever possible, the student uses these skills in a real-world setting (e.g., keeping books for DECA) and engages in business simulations using enhanced computer applications. The student learns about communication, application and computation, ethics, technology, and careers in accounting.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the New Mexico Career Readiness Standards (CR), New Mexico Social Studies Standards (SS), and the National Standards for Business Education (NSBE).

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student acquires and uses accounting terminology and skills throughout the study of accounting.*

A. The student completes and explains the purpose of complex steps in the accounting cycle.

1. Applies appropriate accounting terminology and generally accepted accounting principles effectively (NSBE-1B).
2. Accurately interprets information presented in a technical format (CLAS 18) to explain cost volume profit relationship (NSBE-1B).

STRAND II: APPLICATION AND COMPUTATION OF ACCOUNTING ELEMENTS

CONTENT STANDARD: *The student applies generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity.*

B. The student calculates and analyzes current and long-term assets, short- and long-term liabilities, capital stock, and retained earnings accounts.

1. Applies inventory concepts and costing procedures to merchandising and manufacturing (SS-4A.6; NSBE-2A.5).
2. Examines and calculates various depreciation methods and their impact on financial statements (SS-4A.6; NSBE-2A.6).
3. Uses appropriate technologies to collect (CSS 3) and analyzes accounts for short- and long-term liabilities (NSBE-2B.1).
4. Uses a variety of computational methods (CMS 1, 7) to calculate and apply effective amortization methods (NSBE-2A.8, .9).
5. Calculates the percentage increase and decrease (CMS 13) to calculate capital stock and retained earnings accounts (NSBE-2C.2).
6. Uses advanced spreadsheet software to maintain accounting records (CR-3D; NSBE-1P) and represent and analyze relationships using written and verbal expressions, tables, equations, and graphs, and describe the connections among these representations (CMS 6).
7. Uses a variety of computational methods (CMS 1, 7, 10) to manipulate complex accounts that require adjusting and closing entries (NSBE-1L, O).

STRAND III: ETHICS

CONTENT STANDARD: *The student develops and demonstrates responsible, ethical, and professional behavior.*

C. The student integrates appropriate business ethics into daily activities.

1. Applies business ethics (CR-4A; NSBE-3E).
2. Applies clear and accurate work in all activities (CR-1D, E, 4A).
3. Models appropriate legal behaviors related to accounting practices (CR-4C).

STRAND IV: TECHNOLOGY

CONTENT STANDARD: *The student uses technology to complete the accounting process.*

- D. The student applies a variety of hardware and software to various accounting situations.
 - 1. Identifies and applies measurement techniques and considers possible effects of measurement error (CSS 4) to compare and contrast manual and computerized accounting systems (CR-3; NSBE-3).
 - 2. Uses mathematical models to describe, explain, (CSS 8) and apply mathematical equations on the computer or calculator to various accounting situations (CR-3; NSBE-3).
 - 3. Selects appropriate types of software for specific accounting needs (CR-3; NSBE-3).
 - 4. Evaluates the influence of technology on society (CSS 9) and uses technological advances and programs within the field of accounting (CR-3A, NSBE-3).

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies, demonstrates, and evaluates skills that prepare him/her for success in the workplace.*

- E. The student evaluates skills necessary for jobs available in the accounting pathway.
 - 1. Demonstrates control of grammar, paragraph and sentence structure, diction, syntax (CLAS 20) and applies critical thinking and problem-solving skills (CR-5E).
 - 2. Integrates team-building skills to enhance cooperative learning and interpersonal skills (CR-2B, 4B, 5C, D) and uses discussion with peers as a way of understanding information (CLAS 22).
 - 3. Evaluates the information, explanations, or ideas of others by identifying clear, reasonable criteria (CLAS 7) to identify and prepare for a career pathway in accounting (CR-1, 2A, 3B-D).

Accounting III

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student acquires and uses accounting terminology and skills throughout the study of accounting.*

1. The student chooses an accounting concept (e.g., ledger, stock, dividends), and explains it to a partner who assumes the persona of someone who is unfamiliar with accounting. The roles are then switched.
 - ✓ accurate terminology
 - ✓ clear explanation
2. Prior to study, the student writes a definition of cost, volume, and profit. He/She then writes a post-study definition of each, comparing the two sets of definitions. As part of a small group, the student shares:
 - ✓ new learning
 - ✓ understanding
 - ✓ clear communication

STRAND II: APPLICATION AND COMPUTATION OF ACCOUNTING ELEMENTS

CONTENT STANDARD: *The student applies generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity.*

- 1, 7. The student completes an inventory record that includes the following:
 - date of periodic inventory
 - item description
 - stock number and description
 - actual number of units on hand
 - unit price
 - calculation and record of the total cost
 - determination of total cost for the inventory items
 - ✓ all components present
 - ✓ neatness
 - ✓ accuracy
- 2, 6. The student uses three of the four methods to calculate the amount of depreciation for one year. He/She then rounds the depreciation expense to two decimal places and enters information on a spreadsheet.
 - ✓ accuracy
 - ✓ three methods used
 - ✓ appropriate rounding

3. The student writes an explanation for the following scenario: You work at a bank that only accepts non-interest-bearing notes payable. The owner of a coffee shop approaches you to talk about issuing a note payable. She does not understand that the amount she will receive is less than the face value. What do you tell her?
 - ✓ clear explanation
 - ✓ appropriate writing conventions
 - ✓ accuracy of explanation
4. The student responds to the following memo: On February 4 of this year, High Flying Company sold 600 5%, 15-year bonds with a face value of \$1,000. These bonds were sold at a discount of \$10,000. Please make an entry to amortize \$500 of the discount for this year.
 - ✓ correct entry
 - ✓ accurate calculations
5. Using the income statement and statement of changes in stockholders' equity from a company's annual report, the student answers the following questions: What is the company's return on stockholders' equity for the past three years?; How has the ratio changed?; and How would you interpret the changes?
 - ✓ accurate calculations
 - ✓ correct interpretation

STRAND III: ETHICS

CONTENT STANDARD: *The student develops and demonstrates responsible, ethical, and professional behavior.*

- 1–3. As part of a small group, the student responds to the following scenario: You are an account representative for a U. S. -based agricultural products corporation that recently began selling in eastern Asia. One of your customers recently asked you to invoice your product at less than the actual cost so that the customer can save on high import taxes. The customer is offering to pay the rest “under the table.” The customer gets to save money and your company makes the same money. What is your response?
 - ✓ understanding of ethical issues
 - ✓ alternatives listed
 - ✓ understanding of how the alternatives affect the parties
 - ✓ ethical practices

STRAND IV: TECHNOLOGY

CONTENT STANDARD: *The student uses technology to complete the accounting process.*

1. The student uses a graphic organizer (e.g., Venn diagram) to compare and contrast manual and computerized accounting systems.
 - ✓ appropriate graphic organizer
 - ✓ thoroughness
 - ✓ accuracy

2. The student responds to the following scenario: You and your business partner have capital account balances of \$75,300, \$83,700, \$92,600, and \$87,100, respectively. You and your partner share profits and losses equally. One day your partner dies and your company's assets are revalued as follows:

	<u>Book Value</u>	<u>Revaluation</u>
Merchandise Inventory	\$88,300	\$84,400
Building (net)	160,000	169,000
Equipment (net)	27,500	29,600

The student records the entry for the revaluation of the firm's assets in the appropriate journal, records the payment of the partner's share of the partnership equity to his heirs, determines the total equity of the new partnership, and analyzes the effect of revaluation on current assets and on long-term assets.

- ✓ accuracy
- ✓ logical analysis

- 3, 4. The student describes technologies used to keep safe financial transactions conducted on the Internet.

- ✓ encryption
- ✓ digital certificates

STRAND V: CAREER READINESS

CONTENT STANDARD: *The student identifies, demonstrates, and evaluates skills that prepare him/her for success in the workplace.*

- 1–3. Using the Internet and other resources (e.g., career video, accounting professionals), the student investigates one of the different types of jobs in the accounting field, the types of businesses and organizations that hire accountants, educational requirements, and salary potential of the specific accounting job. After the student creates a table of information learned, he/she meets with students who have researched the same career to compare information. Each of these students then goes to another group that consists of a member representing each of the accounting careers. The group members share information, and create a presentation showing the pros and cons of each career.

- ✓ thorough research
- ✓ accurate information
- ✓ appealing presentation
- ✓ appropriate presentation skills
- ✓ team work

Business Computer Skills for the Workplace: Pathway Standards

In **Business Computer Skills for the Workplace**, the student becomes proficient in the use of Windows™ and computer software programs including word processing (e.g., Microsoft™ Word), databases (e.g., Microsoft™ Access), spreadsheets and charts (e.g., Microsoft™ Excel), presentation (e.g., Microsoft™ PowerPoint®), and desktop publishing (e.g., Microsoft™ Publisher®) as well as the Internet and basic Web page design. The student becomes competent in workplace skills and is prepared for employment or advanced training. A student internship is available second semester for the student with a minimum 2.5 cumulative grade point average.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the National Standards for Business (NBS) State of New Mexico Career Readiness Standards (CR), APS Language Arts Standards (LA) and the APS Mathematics Standards (MA).

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- A. The student demonstrates communication skills critical for acquiring, interpreting, evaluating, and managing information.
 - 1. Reads critically and independently (CLAS 14) to gather information from casual print and electronic media (NBS–Comm–IB.6; LA–IIC9.1).
 - 2. Reads and follows written and oral directions (NBS–Comm–IB.8, ID.1; LA–IID9.1; IA10, 3).
 - 3. Expands vocabulary to include simple business terms (NBS–Comm–IB.10; LA–ID11.1).
 - 4. Researches, synthesizes, and organizes (CLAS 19) information using the Internet and selects appropriate materials for reports and presentations (NBS–Comm–IB.19; LA–IB ALL).
 - 5. Demonstrates control of grammar, paragraph and sentence structure, and syntax (CLAS 20) and distinguishes between paraphrasing, documentation, and plagiarism (NBS–Comm–I.8; LA–IIB10.1).
 - 6. Identifies properly both print and electronic sources to avoid plagiarism (NSB–Comm–IC.8; LA–IIB10.1).
 - 7. Composes and produces a variety of business messages and reports using correct style, format, and content (NSB–Comm–IC.27; LA–IIA10.2).
 - 8. Proofreads and refines documents using electronic spell check, thesaurus, and grammar check (NBS–Comm–III.11; LA–IIB11.2).

STRAND II: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

- B. The student develops, locates, summarizes, organizes, synthesizes, and evaluates information for problem solving, writing, and research.
 - 1. Demonstrates basic keyboarding and computer functions using proper input techniques for acceptable speed and accuracy levels (NSB–Comm–III.2; IT–VI.1,3; CR–3B, 3D).
 - 2. Creates and uses criteria to evaluate the effectiveness of communication (CLAS 13) by identifying and using basic and advanced application software appropriate to specific tasks (e.g., word processing, spreadsheets, databases, graphics, Web browser) (NBS–

- IT–V. 3, V.4, V.6; CR–3A, 3B, 3D).
3. Reads critically and independently (CLAS 14) and uses application software reference materials (e.g., vendor web sites, tutorials, manuals) (NBS–IT –V7; CR–3B, 3D).
4. Uses the collaborative features of application software to complete simulated or real organization tasks (NBS–Comm–III.4, IT–V8;CR–3B, 3C, 3D)(CLAS 7) as a way of understanding information (CLAS 22).
5. Uses appropriate technologies to collect, analyze, and communicate information (CSS 3) in documents that include a variety of media (e.g., images, text, and sounds) (NSB–IT–V.2; CR–3B, 3D).
6. Creates multiple displays of data to analyze and explain relationships in investigations (CSS 7) by importing and exporting media (e.g., text, data, sound, video and still images) between software programs (NBS–IT–V.19; CR–3B, 3C, 3D).
7. Uses search procedures appropriate to type of information, nature of source, and nature of query by accessing, manipulating, and using online services (NBS–IT VII.6, XII.1; CR–3B, 3D).
8. Explains the nature and interrelationships of fields, records, and databases (NBS–IT–VIII.5; CR–3A).
9. Populates and edits fields and records (NBS–IT–VIII.1; CR–3B, 3D).
10. Sorts, retrieves, organizes, and presents data from databases (NBS–IT–VIII.2, 4; CR–3B, 3C, 3D).
11. Designs and creates basic Web pages incorporating various file types (e.g., text, image, sound, and video) (NBS–IT–XII.6; CR–3B).

STRAND III: MATHEMATICS LITERACY

CONTENT STANDARD: *The student demonstrates the importance of math skills in the development of his/her role as an employee.*

- C. The student solves mathematical problems, analyzes and interprets data, and applies sound decision-making skills.
 1. Represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs; and describes the connections among these representations (CMS 6).
 2. Generates different representation to model a specific numerical relationships (CMS 5), uses correct mathematical processes for various problem situations (CMS 1,4,7,13) and solves formulas for specified variables (CMS 9)(NSB–Comp–I.1; MA–IA.6).
 3. Generates an algebraic sentence to model real-life situations (CMS 8) and selects and uses appropriate tools when solving problems (e.g., hand-held, computer and Web calculators, computer numerical keypads and spreadsheets) (NSB–Comp–I.2; MA–IC.2).
 4. Understands the difference between the various methods of data collection (CMS 15) and makes inferences about data, tables, charts, and graphs (NSB–Comp–V.1; MA–IB.2).

STRAND IV: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

- D. The student researches career options, applies job acquisition skills, and prepares job search documentation.
 1. Synthesizes and organizes information from a variety of sources (CLAS 19) to explore careers in business technology (NBS–IT–XVII.3; CR–1A).
 2. Creates and uses criteria to evaluate the effectiveness of written communication (CLAS 13) in developing a personal presentation package (CR-1D, 5E).

STRAND V: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- E. The student identifies and demonstrates the skills which positively affect productivity.
 - 1. Demonstrates personal qualities related to employability (e.g., promptness, ability to get along with others, dependability, positive attitude, image, respect for diversity, and communication skills) (NBS–CD–IIIA.1; CR–4A).
 - 2. Demonstrates responsible behavior related to employability (e.g., respect for others, interpersonal skills, social skills, and communication skills) (NBS–CD–III.2; CR–4A).

Business Computer Skills: Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance or oral and written communication skills essential for interacting effectively in personal and professional situations.*

1–8. The student completes the requested tasks of this scenario:

From Attorney John Davis:

I would like to learn more about the DPT vaccine and whether there has been other litigation involving the use of the vaccine on children. Please research this topic on the Internet and locate some general clinical information about DPT vaccine, including its benefits and risks. I would also like you to see if you can locate some cases where DPT was involved and what the outcome of the litigation was. Finally, see if you can locate some information on DPT encephalopathy so I can familiarize myself with some characteristics of this disorder. Outline your findings for me in a memo and be sure to let me know the Web site locations you find so I may look at them later.

The student meets in a group to participate in a panel discussion about findings.

- ✓ printed copy of Internet sites and links with information on the topic
- ✓ printed copy of clinical information about DPT vaccine
- ✓ printed copy of documents of litigation involving vaccine
- ✓ creation of memo with outline of research findings
- ✓ participation in panel discussion

OR

The student does research on a business, legal or medical topic. The student uses both printed and electronic resources when researching the topic. The final product is presented in a formal business report format.

rough draft with corrections

- ✓ outline of report
- ✓ accuracy of report findings
- ✓ correct spelling, punctuation, grammar, word usage, and mechanics
- ✓ paraphrasing
- ✓ documentation (e.g., quoted passages)
- ✓ citations

STRAND II: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improving learning, achieve goals, and produce products and presentations.*

- 1–7. The student produces a PowerPoint® presentation of a person he/she admires. The person can be alive or deceased. Some considerations include a close friend, relative or stranger (e.g., a famous person). The student includes the name of the person being reported, birth date of the subject, his/her contributions to society, qualities of the person, what the student found interesting about the person, direct quotes from or about the person, and what one word would best describe the person and why.

The student creates a storyboard that illustrates the slide presentation structure with thumbnail sketches of each slide including title of slide, text background color, place and size of graphics, fonts-color, size, type of text and headings. All thumbnail sketches must be numbered displaying a logical sequence to the presentation.

The presentation time depends on the number of slides and the amount of time needed per slide.

Knowledge Content

- ✓ thoroughness and completion of content requirements
- ✓ accurate information
- ✓ all sources of information are clearly identified and credited

PowerPoint® Presentation

- ✓ completion of storyboard requirements
- ✓ delivery of presentation (e.g., timing, organization)
- ✓ easily read fonts
- ✓ point size variations appropriate for headings and text
- ✓ variety of layouts that are aesthetically pleasing
- ✓ graphics, sound and/or animation that assist in presenting an overall theme
- ✓ no errors in grammar, capitalization, punctuation, and spelling

- 1–7. The student creates the PowerPoint® presentation on his/her research project found in STRAND IV: CAREER DEVELOPMENT, Performance Standard 1 or 2. The guidelines and ✓s are listed above.
8. The student creates a poster of database terminology and illustrates or gives an example of how each is used in the business world.
- ✓ accurate depiction of term within the business application
- 9, 10. The student completes the following tasks:
- a) Produce a database with student information. The fields in the table include ID Number, First Name, Last Name, Address, Phone Number, Cell Phone Number, School Name, Grade, Social Security No, Birth date. Enter five records (students), select the columns and format for Best Fit, and print the table.
 - b) Using the additional information by the teacher, make changes indicated to the table (e.g., address corrections, phone number changes, school changes).
 - c) Create a form from the existing table using the wizard. Modify the design of the form; move the School, Grade, Social Security No.

and Birthdate fields to the right upper side of the form. Then add the label, Required Student Information, to the Form Header, increasing the font size to 14 or 16. Insert a related piece of clipart into the header. Finally, reduce the length of the form and print the first record in the form.

- d) Add five records to the table using the form.
- e) Use a filter to retrieve all of the junior students and print the records.
- f) Print the table listing all students sorted by last name, first name.
- g) Produce a Report from the table using the wizard. Include these fields: ID Number, First Name, Last Name, Phone Number, School, and Grade. Group by school, sort by last name, use stepped layout and choice of style, and name it Student Report.
- h) Modify the design so all field labels and text are easy to read. Place first and last names next to each other. Insert clipart in the header. Print the report.
 - ✓ accurate completion of a – h tasks
 - ✓ correct spelling of entries
 - ✓ correct formats
 - ✓ correct fields and labeling

11. The student produces a Web page about one of the fifty states. He/She researches the Internet (e.g., <http://www.50states.com>). The student uses this design:

Name of State
Capital
Date of statehood
Largest cities

Surrounding States, Countries and/or Bodies of Water

Size, Population, Location

Major Rivers, Lakes, and/or Mountain Ranges

State Bird, Flower, Nickname, and Tree

Three Things (State) is Known For

Information Sources

The student completes these additional requirements:

- background color or theme
- different color for each category's name
- one background graphic

- two or more graphics within the Web page
- video and sound clip
- three hyperlinks to related topics
- completion of all required components
- required format
- correct use of spelling and language conventions
- well-organized layout/design
- background that enhances page
- creative graphics and/or clipart links that work properly

STRAND III: MATHEMATICS LITERACY

CONTENT STANDARD: *The student demonstrates the importance of math skills in the development of his/her role as an employee.*

1–3. The student completes tasks for this scenario:

Franklin's Flower Store has hired you as a summer intern. Because your résumé shows you have Excel experience, the assistant manager has asked you to prepare a weekly payroll report for five employees. Use Excel to create the payroll report. The title is centered over each column. Format the columns for two decimal places and best fit.

Worksheet Directions

- Title the worksheet FRANKLIN'S FLOWER STORE PAYROLL and center it over all columns.
- For the Week Ending (put current date). Column Titles are Employee, Hourly Rate, Hours Worked, Gross Wages, Soc. Sec. Tax (SS Tax), Medicare Tax, Federal Withholding Tax (FWT), State Tax, and Net Pay.
- Under the Employee column enter your name first and then add Debbie Hays, Sara Davidson, Mike Peterson, and Lindsey Hanosh. Enter the last name first.
- Under the Hourly Rate column enter the following figures: for you - \$9.00, for Debbie - \$8.25, for Sara - \$7.75, for Mike - \$7.00 and for Lindsey - \$7.50.
- Under the Hours Worked column enter the following figures: for you - 40, for Debbie - 38.5, for Sara - 35, Mike – 37, and for Lindsey - 40.
- Calculate the taxes and the Net Pay.

Formulas to Use

- Gross pay = rate x hours
- Tax amount = gross pay X percentage (SS Tax – 7.2%; Medicare – 2.5%; FWT – 21%; State Tax – 3.5%)
- Net pay = gross pay – taxes

Use appropriate functions to determine the Total, Average, Highest, and Lowest values of each column. Print both worksheet and worksheet with formulas. Present findings to a partner.

- ✓ centered and bold titles
- ✓ appropriate formulas for taxes and net pay

- ✓ formulas copied in appropriate cell
- ✓ auto sum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places
- ✓ copy of worksheet
- ✓ copy of worksheet with formulas

OR

The student follows the instructions in this scenario.

On-the-Corner Appliances has hired you as a summer intern. Because your résumé shows you have Excel experience, the assistant manager has asked you to prepare a spreadsheet to calculate the discount and selling price for some of the best selling appliances. Use Excel to create this report. The titles are centered over each column and wrap text should be checked; format the columns for two decimal places and best fit.

Worksheet Directions

- a) Title the worksheet ON-THE-CORNER APPLIANCES and center it over all columns.
- b) Column Titles are Appliance, Retail List Price, Our Discount, Our Selling Price, Sales Tax, and Total Price.
- c) Under the Appliance column enter Built-In Oven, Side-by-Side Refrigerator, Washing Machine, Gas Dryer, Deluxe Dishwasher, and Trash Compactor.
- d) Under the Retail List Price column enter \$805, \$1,295, \$579, \$405, \$525, and \$549.
- e) Calculate the Discount ($16\% \times \text{Retail List Price}$).
- f) Calculate the Selling Price ($\text{Retail Price} - \text{Discount}$).
- g) Calculate the Sales Tax ($5.8\% \times \text{Selling Price}$).
- h) Calculate the Total Price ($\text{Selling Price} + \text{Sales Tax}$).

Use appropriate functions to determine the Total, Average, Highest, and Lowest values of each column. Print both worksheet and worksheet with formulas. Present findings to a partner.

- ✓ centered and bold titles
- ✓ appropriate formulas for Discount and Sales Tax
- ✓ formulas copied in appropriate cell
- ✓ auto sum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places
- ✓ copy of worksheet
- ✓ copy of worksheet with formulas

STRAND IV: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

1. The student completes a business career research project which consists of the following steps:

Self-Assessment

Through the use of personal-awareness techniques, the student identifies his/her interests, skills, values, needs and behavioral traits by answering a variety of surveys provided by the teacher.

Research

Using what he/she learned about his/her interests, the student reviews various sources of occupational information to identify occupations that best match the interests. The student finds three occupations that match the interests and uses these jobs to develop a list of career possibilities.

The student researches each job title on the list to learn more about each option. He/She gathers such information as duties, entrance qualifications, training options, salary and benefits, advancement opportunities, and positive and negative working conditions. This information can be obtained through printed literature, actual conversations with workers, or from sites on the Internet.

Make a Tentative Career Decision

Based upon what is known about the interests and matching occupations, the student selects an occupation to pursue.

(Optional) Test Out the Decision

It's often impossible to determine if an occupation is right unless it is tried. There are several ways to do this. The student works as a volunteer, shadows a professional worker for a day, interviews several people within the chosen field, or does something to get a feel for the real job. The student tests all his/her career options before moving onto the next step.

Make a Final Career Decision

Based upon what is known about his/her personality and the world of work, the student selects an occupation that is the best match.

The student creates a display representing the findings of each step. In a job fair setting, the student presents the findings to other students.

- ✓ completion of required steps
- ✓ creative job fair display
- ✓ research findings (optional)
- ✓ citation of sources
- ✓ presentation techniques
- ✓ correct spelling and language conventions

OR

The student creates a PowerPoint® presentation based on his/her research.

The student creates a storyboard that illustrates the slide presentation structure with thumbnail sketches of each slide including: title of slide, text background color, place and size of graphics, fonts-color, size, type for text and headings. All thumbnail sketches must be numbered displaying a logical sequence to the presentation. The presentation time depends on the number of slides, considering one minute per slide.

- ✓ completion of all components of portfolio
- ✓ completion of storyboard requirements
- ✓ delivery of presentation (e.g., timing, organization)
- ✓ easily read fonts
- ✓ point size variations appropriate for headings and text
- ✓ variety of layouts that are aesthetically pleasing
- ✓ graphics, sound and/or animation that assist in presenting an overall theme
- ✓ no errors in grammar, capitalization, punctuation, and spelling

2. The student reads and responds to the following advertisement in the location newspaper.

Part-Time office assistant needed for a growing office. Hours are flexible. Must be proficient in word processing software and have a working knowledge of spreadsheet and database software. Must have good keyboarding and proofreading skills. Request an application by sending a résumé to: Melissa Romero, Office Manager, P.O. Box 5523, Albuquerque, NM 87102.

a) The student composes a short letter of application (4-6 sentences) typed in a personal business letter style and includes the following information:

- the desired position
- how he/she found out about the job
- a listing of any special training the student has, his/her qualifications and personal attributes
- the enclosed résumé
- a requested application form
- an interview availability
 - ✓ a positive conclusion (e.g., I am looking forward to having an interview with you or I hope to hear from you within the week.).
 - ✓ all required components
 - ✓ effective writing elements and conventions

b) The student completes an employment application following these directions:

- be honest.
- follow the directions.
- write legibly, using blue or black ink.
- have no spelling or language convention errors.
- complete all questions and sections (you may put N/A or draw a line through something that doesn't apply).
- have reference information available (phone numbers, addresses, etc).
- sign where indicated.

- c) The student designs a résumé following these general guidelines:
- Have the information fit on one page.
 - Provide your name, address, city, state, ZIP code, telephone number.
 - List your positive qualities.
 - Provide a category for each section.
 - Academic Information. List the name(s) and address(es) of high school(s), expected date of graduation and your grade point average if it is a 3.0 or above
 - Work Experience. List the name, address, and phone number, job title and duties you performed and dates employed for each employer. List most recent job first. You may include volunteer work.
 - Optional Categories. These may include Special Courses taken, Special Skills (list knowledge of numerous computer software programs), Activities, Special Recognition, Hobbies and Interests.
 - References. List at least three, two of which should be teachers. Do not use relatives or friends. Include each person's name, job title, business address, and telephone number.
- d) The student creates an Interview Tips sheet. Possible topics include:
- How To Prepare For The Interview.
 - What To Take With You On An Interview.
 - How To Dress For An Interview.
 - Mannerisms To Avoid At An Interview.
 - Legal And Illegal Interview Questions.
 - Acceptable and Non-acceptable Interviewee Behavior.
 - Things To Do When The Interview Is Over.
 - Questions That Are Reasonable To Ask The Interviewer.
- e) The student composes a short follow-up letter typed in a personal business letter style and includes the following information:
- A thank you for the interview; mentioning the specific job.
 - A personal comment about something that occurred during the interview.
 - A statement looking for an action on his/her part (e.g., I look forward to hearing from you or I know I am the ideal candidate for the position).
 - ✓ completion of all required components in a, b, c, and d sections.
 - ✓ correct spelling and language conventions
 - ✓ use of portfolio format (e.g. organization, container for inclusions)

STRAND V: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- 1–2. The student participates in a variety of class discussions. The first involves listing personal qualities that are necessary to maintain in the workplace. The second discussion involves responsible behavior related to employability. Using information from the discussion, the class creates a checklist. A checklist is then developed into log form that the student maintains over a period of time. Once the task is completed, the student writes a report on his/her strengths and weaknesses providing strategies to maintain the strengths and strategies to improve the weaknesses. The information is shared in a third discussion group – small groups format. The student participates in a constructive suggestion session after each student's presentation to provide other strategies to maintain strengths and to improve on weaknesses.
 - ✓ completion of log
 - ✓ participation in all discussion groups
 - ✓ correct use of constructive suggestions
 - ✓ reflective report on strengths, weakness, and strategies
 - ✓ ability to listen openly to other students' suggestions
1. The student keeps a journal on how he/she maintains personal qualities related to employability in and out of school.
 - ✓ identification of personal qualities and how each is manifested in school
2. The student keeps a journal on how he/she maintains responsible behavior related to employability in and out of school.
 - ✓ identification of responsible behaviors related to employability and how each is manifested in school

Money, Success, and Power in Business

Pathway Standards

Money, Success, and Power in Business is designed for the student interested in the financial services and its related fields. The course addresses employment strategies, business planning, and techniques to be successful in the business field. The financial services portion emphasizes the knowledge and skills necessary for career paths and entry-level positions in banks or credit unions. Money, Success and Power in Business provides a great opportunity to explore the vast world of finance and business.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards, the National Standards for Business (NSB), State of New Mexico Career Readiness Standards (CR), Language Arts Standards (LA), and Mathematics Standards (MA).

STRAND I: PERSONAL FINANCE

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to his/her personal financial affairs.*

- A. The student A) develops and evaluates a spending/savings plan, B) identifies and describes services provided by financial deposit institutions, and C) identifies and describes factors that affect the choice of credit, the cost of credit, and the legal aspects of using credit.
 - 1. Identifies various sources of money for personal spending (NBS–PF–III).
 - 2. Uses a variety of computational methods to estimate (CMS 1), construct, and use a personal spending/savings plan (NBS–PF–III.2).
 - 3. Responds to informational texts by using a variety of strategies for preparation, engagement, and reflection; paraphrasing main ideas and supporting details (CLAS 4) to identify various types of financial deposit institutions (NBS–PF–VI.1).
 - 4. Reads critically and independently (CLAS 14) to list and describe the basic services provided by financial deposit institutions and the costs associated with the services (e.g. overdrafts and stop-payment orders) (NBS–PF–VI.2, 9).
 - 5. Identifies and demonstrates the rights and responsibilities of personal banking management (i.e. using a checking account, debit cards, transferring funds) (NBS–PF–VI 3–11).
 - 6. Uses a variety of technology tools to present and discuss information (CLAS 27) on the advantages and disadvantages of banking (NBS–PF–VI.12).
 - 7. Examines texts for arguments and develops an informed opinion (CLAS 11) on the privacy and security issues associated with financial transactions (NBS–PF–VI.13).
 - 8. Identifies and demonstrates an understanding of personal financial management (i.e. use of credit, interest rates) (NBS–PF–VII.4, 6, 7).
 - 9. Accurately interprets information presented in a technical format (e.g., charts, diagrams, tables) (CLAS 18) to explain credit ratings and credit reports and describes why they are important to consumers (NBS–PF–VII.13).
 - 10. Researches rights and responsibilities of consumers according to credit legislation (e.g., truth-in-lending, fair credit, reporting, equal credit opportunity, fair debt collection) (NBS–PF–VII.17).

STRAND II: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

- B. The student reaches career options, applies job acquisition skills, and prepares job search documentation.
 - 1. Develops a career portfolio of items including résumés, sample cover letters, letters of recommendation, examples of work and technical skills, awards, and documentation of extracurricular activities and community service activities (NBS–CD–VA.13; CR–4A) and makes a well-informed and well-organized formal presentation of the portfolio with a clear main point, adjusting the message, wording, and delivery to the particular audience and context (CLAS 29).
 - 2. Experiences paid/unpaid work opportunities in chosen career clusters through various opportunities (e.g., job shadowing, mentoring, e-mentoring, internships, cooperative work experiences, community service (NBS–CD–VD.3; CR–4A).
 - 3. Analyzes and applies employment process to obtain successful employment (e.g., proper etiquette for meeting and greeting people) (NBS–CD–VC.3,4,13; Comm–IV.5,13,17, 26, 28; CR–4A, B, C).

STRAND III: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- C. The student identifies and demonstrates the skills which positively affect productivity.
 - 1. Identifies and demonstrates personal qualities related to both school and employability (e.g., promptness, ability to get along with others, dependability, willingness to ask questions, respect for diversity, and communication skills) (NBS–CD–IIIA.1,7,9,14; IIIB.1, 8; CR–4A).
 - 2. Identifies and demonstrates responsible behavior and social skills related to both school and employability (e.g., respect for personal property, completion of homework assignments, communication skills) (NBS–CD–IIIA.2,7,8,14; IIIB.1, 8; CR–4A).
 - 3. Exhibits important career self management skills (e.g., accessing job/career development resources, networking, time management, and research skills) (NBS–CD–IIIG.5; CR–4A).

STRAND IV: ENTREPRENEURSHIP

CONTENT STANDARD: *The student examines the role of entrepreneurship and entrepreneur.*

- D. The student develops a business plan and demonstrates the qualities of operating and maintaining a business.
 - 1. Expresses an informed opinion that clearly states a personal view, is logical and coherent, and engages the reader (CLAS 25) to define long-term and short-term planning (NBS–Entrep–IX.4; CR–2A).
 - 2. Understands the essential components of an investigation, including appropriate methodologies, proper equipment, and safety precautions (CSS 1) as an essential component in developing a business plan (NBS–Entrep–IX.7).
 - 3. Describes and develops a business plan for a planned business (NBS–Entrep–IX.7, 11) that demonstrates control of grammar, paragraph and sentence structure (CLAS 20).
 - 4. Uses an array of media and technologies (CLAS 24) to identify and describe various types of business ownership (e.g., corporations, cooperatives) (NBS–Entrep–VIIA.1, 4).
 - 5. Uses a variety of computational methods, (e.g., mental arithmetic, paper and pencil, technological tools) (CMS 7) to determine the resources needed (e.g., long and short term financing, materials, labor) to start planned business (NBS–Entrep – IVA.3, 4; Mkt–XA.1).
 - 6. Reads critically and independently (CLAS 21) to identify sources of financing (NBS–Mkt–XA.1).

STRAND V: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

- E. The student demonstrates communication skills critical for the acquiring, interpreting, evaluating, and managing information.
1. Demonstrates concepts and skills related to effective communication (i.e., appropriate language and vocabulary for situation) (CLAS 20)(NBS–Comm–IA.3, 4; LA11–IIB.1, 2).
 2. Reads and interprets information from a variety of sources (books, online resources, manuals, electronic sources) (CLAS 21,30) (NBS–Comm–IB.3,7,16; LA12–1D.1).
 3. Researches information using the Internet and selects appropriate materials for reports and presentations (NBS–Comm–IB.18; LA11–IB.1-4, LA12–IIB.2).
 4. Proofreads, edits and reviews business document to ensure correct grammar, spelling, punctuation and word usage (NBS–Comm–IC.1, IC.4, IC.11, IC.34; LA II–IIB.1).
 5. Composes a variety of writings (e.g., simple requests for information, reports, summaries) (NBS–Comm–IC.3, IC.35; LA11–IIC.2, LA12–IIB.1).
 6. Listens for information in a variety of situations (e.g., meaning, record complete and accurate telephone messages, taking notes, completing forms) (NBS–Comm–ID.3, ID.4, ID.7; LA11–IIA.2, 3).
 7. Demonstrates courtesy and respect for the speaker using active listening techniques (NBS–Comm–ID.3, ID.8, ID.11, ID.12; LA11–ID.2).

STRAND VI: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

- F. The student solves mathematical problems, analyzes and interprets data, and applies sound decision-making skills.
1. Generates different representations to model specific numerical relationships given one representation to data (CMS 5) to determine and apply the correct mathematical processes and formulas to solve business problems (NBS–Comp–I.1,14; V.2; MA–I.1, 15; II.10E).
 2. Uses a variety of computational methods to estimate quantities involving real numbers (CMS 1, 7) to maintain accurate business records (NBS–Comp–VID.1, 2, 3, 6, VIE.1–3; , MA–I.15).
 3. Represents and analyzes relationships using written and verbal expressions, tables, equations, and graphs (CMS 6) to identify ongoing operational expenses (NBS–Entrep–IVA.5).
 4. Generates algebraic sentences to model (CMS 8).and interpret data shown on financial statements (e.g., income statement, balance sheet, cash flow statements of net worth) (NBS–Mkt –XA.5; ECON–II.10).
 5. Compares and draws conclusions between two or more sets of univariate data using data analysis techniques (CMS 18) to examine a profit/loss statement to determine whether a business is profitable (NBS–Entrep–IVC.1; ECON–II.6, II.10).
 6. Uses a variety of computational methods (CMS 1, 7) to prepare an opening day balance sheet for a planned business (NBS–Entrep–VC.6; ECON–II.6).
 7. Identifies and applies measurement techniques and considers possible effects of measurement errors (CSS 4) to prepare one-year performance for a planned business (NBS–Entrep–VC.7; ECON–II.6).
 8. Demonstrates understanding of the relationship between ratios, proportions, and percents and solves for a missing term in a proportion (CMS 4) when computing net sales with sales/returns allowances and sales discount (NBS–Comp–VIH.4; MA–I.15).

9. Solves formulas for specified variables (CMS 9) to calculate sales projections and market share (NBS–Comp–VIH.7).
10. Uses a variety of computational methods (CMS 1, 7) to calculate advertising costs (NBS–Comp–VIH.8; MA–I.15).
11. Estimates the rate of change (CMS 14) when calculating the operating profits or loss, absolute loss, and break even point (NBS–Comp–VIH.9; MA–I.15).
12. Uses appropriate technologies to collect and analyze data (CSS 3) to determine cost of goods sold for a given period using different inventory valuation methods (NBS–Comp–VII.2; MA–I.15) and demonstrates this change as a graph of an equation (CMS 12).
13. Creates multiple displays of data to analyze and explain relationships (CSS 7) to determine gross profit for a given period using different inventory evaluation methods (NBS–Comp–VII.3; MA–I.15).
14. Defines the differences between debt and equity (NBS–Entrep–IVB.3; ECON–II.6).

STRAND VII: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

- G. The student develops, locates, summarizes, synthesizes, and evaluates information for problem solving, writing, and research.
 1. Identifies and explains the major components of accounting/finance information technologies and their interrelationships (NBS–IT–IV.2; CR–13, 3B–3C).
 2. Uses basic software applications (e.g., word processing, spreadsheets, databases, graphics) (NBS–Comm–IT–III.3; CR–3A–3C).
 3. Enters and manipulates numeric data using the touch method of a 10-key keypad (NBS–IT–VI.2; CR–3B–3D).
 4. Finds, classifies, and orders retrieved information (NBS–IT–VII.4; CR–3A–D).
 5. Discusses rules of safe and appropriate conduct when using the Internet and e-mail (CLAS 10)(NBS–Comm–IT–III.12; CR–4D).
 6. Adheres to safety and security policies (e.g., acceptable use policy, Web page policies, student photo policies) (NBS–IT–XV.1; CR–4D).
 7. Adheres to federal and state laws that apply to safety and security including laws pertaining to computer crime, fraud, and abuse (NBS–IT–XV.4; CR–4C–4D)
 8. Identifies and adheres to appropriate employer, federal, and state safety, security and privacy issues (NBS–IT–XVI.1, 4; CR–4C–4D).

STRAND VII: MANAGEMENT

CONTENT STANDARD: *The student identifies and practices the theories and principles of managing a business.*

- H. The student applies management functions, principles, and processes that contribute to the achievement of organizational goals.
 1. Knows the characteristics of a well-designed and well-conducted survey (CMS 17)(CSS 1) to design and implement a time management schedule as a result of a time management analysis (NBS–Mgt–IVA.3; CR–2A).
 2. Plans human resource needs (NBS–Entrep–VIB.8; CR–2C).

STRAND IX: MARKETING

CONTENT STANDARD: *The student identifies and practices the theories and principles of marketing.*

- I. The student identifies and applies marketing functions, principles, and processes that contribute to the achievement of marketing goals.
 1. Determines potential buyers of specific products at various price levels (NBS–Entrep–IIA.2; CR–1B, 2C).
 2. Accurately interprets information from and detect inconsistencies in a variety of informational and technical texts (CLAS 17) to define and give examples of market segmentation (NBS–Entrep–IIA.3; CR–2C).

3. Understands and the characteristics of a well-designed and well-conducted survey (CMS 17)(CSS 1) and defines and gives examples of target markets for specific products (CSS (NBS–Entrep–IIA.4; CR–2C).
4. Identifies target markets for potential new businesses (NBS–Entrep–IIA.6; CR–2C).
5. Uses multiple resources to gather information to evaluate problems, examine cause and effect relationships, and answer market research questions (CLAS 8) (NBS–Mkt–V.3; CR–2C).
6. Synthesizes and organizes information from a variety of sources (CLAS 19) to discuss various ways competition helps the consumer (NBS–PF–V.2; CR–2C).

STRAND X: LAW

CONTENT STANDARD: *The student identifies and demonstrates the basic principles of law relevant to business operations in a global economy.*

- J. The student explains how laws and regulations are created and applied.
 1. Identifies and examines a business code of ethics (NBS–Mkt–VA1;CR–4A, 4C).
 2. Accurately interprets information from and detects inconsistencies in a variety of informational and technical texts (CLAS 17) to define different types of business crime (e.g., arson, forgery, embezzlement) (NBS–IE.4).
 3. Identifies legislation that regulates consumer credit and electronic credit transactions (e.g., Fair Credit Reporting Act, Fair Credit Billing Act, Equal Credit Opportunity Act, Fair Credit Collection Practices Act, Consumer Credit Protection Act) (NBS–BL–IIA. 37; CR–1B).
 4. Informs an audience using a variety of media to research and explain insights (CLAS 9) about consumer protection legislation (e.g., Federal Trade Commission Act, Consumer Product Safety Act, Consumer Leasing Act) (NBS–BL–IIA. 38CR–1B).
 5. Demonstrates an understanding of the concept of negotiability and distinguish it from assignability (NBS–BL–VIA.2; CR–1B).
 6. Identifies and explains the essential elements of a negotiable instrument (NBS–BL–VIA.3; CR–1B).
 7. Describes the different types of negotiable instruments and different types of endorsements (NBS–BL–VIA.4; CR–1B).
 8. Explains the contractual relationship between a bank and its customers (NBS–BL–VIA.5; CR–1B).
 9. Describes stop-payment orders (NBS–BL–VIA.6; CR–1B).
 10. Describes the legal effect of forgeries and material alterations (NBS–BL–VIA.7; CR–1B).

Money, Success, and Power in Business

Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

Course Note: *A major requirement for the student participating in Money, Success and Power in Business is the Business Plan project. The student completes 19 components (worksheets) of the project, which are integrated throughout the course and play an integral role in the curriculum.*

STRAND I: PERSONAL FINANCE

CONTENT STANDARD: *The student identifies, develops, and demonstrates the skills to make wise economic decisions related to his/her personal financial affairs.*

- 1–2. The student creates and maintains a budget for six months. The set income is \$1600 per month after taxes. In a brainstorming session, the student lists fixed expenses (i.e., utilities, food, transportation, car loan, savings, health, car insurance and entertainment). The student assigns each fixed expense with a color to be used in a pie graph later. Throughout the time period, the teacher provides emergency situations in which the student rearrange his/her budget to meet the emergency expenses. The emergency expenses will be lumped together and given one color to be used in the pie graph later on. Using a teacher-provided packet of checks and a register, the student maintains a checkbook to be used to pay for the expenses. After the budget timeframe, the student determines the total expenses in the budget and transfers the information into a pie graph. He/She then shares the pie graph with a partner and solicits answers to three questions:
- How successful was my budget? In other words, do I have money in savings or am I in the red?
 - What were my strengths maintaining my budget? What strategies can be used to maintain the strengths?
 - What were my weaknesses maintaining my budget? What strategies can be implemented to improve the financial situation?

The partner interprets the information from the graph when responding to the questions.

- ✓ completed six month budget in a correct model form
- ✓ correct information on the pie graph
- ✓ strategies for strengths and weaknesses
- ✓ individual participation

- 3–4. The student researches a variety of financial institutions to determine the services offered. Some areas of investigation may include available accounts and services, loan rates, online banking opportunities, online bill payer, mortgage rates, IRA account rates, money market rates and member seminars. The student presents information in an organized chart and presents findings to the class including what banking institution was chosen and why.
- ✓ accurate information on services
 - ✓ suitable form of organizational graphic
 - ✓ effective presentations

5–7. The student presents a PowerPoint® presentation on an aspect of banking. Topics include: rights and responsibilities with using a checking account, steps involving in opening and using a checking account, banking services and how to use them, how to reconcile a bank account, check writing tips, advantages and disadvantages of banking, how banks do business, consumer protection and banking.

- ✓ accurate information
- ✓ thorough completion of content requirements
- ✓ accurate information
- ✓ all sources of information are clearly identified and credited

POWERPOINT® PRESENTATION

- ✓ delivery of presentation (e.g., timing, organization)
- ✓ easily read fonts
- ✓ point size variations appropriate for headings and text
- ✓ variety of layouts that are aesthetically pleasing
- ✓ graphics, sound and/or animation that assist in presenting an overall theme
- ✓ no errors in grammar, capitalization, punctuation, and spelling

8–10. The student meets in a group to complete a jigsaw exercise in which each group member researches an aspect of credit. The research can be from print or electronic sources and must be cited. The student writes his/her findings in a report form, providing an outline at the beginning of the report. The group's topics for research are: methods of establishing and maintaining good credit, identifying various types of credit, credit ratings, the rights of the consumer according to credit legislation (i.e., Truth in Lending Credit Reporting Act, [Fair Credit Billing Act](#), Equal Credit Opportunity Act, [Consumer Leasing Act](#), [Fair Debt Collection Practices Act](#)) and the responsibilities of consumers according to credit legislation. The student meets with a student from each of the other groups who represents the other topics. Each member of the new group presents his/her findings.

- ✓ research methods
- ✓ accurate information on topic
- ✓ written report with no errors in spelling, punctuation, and grammar
- ✓ participation in group discussion including listening skills

STRAND II: CAREER DEVELOPMENT

CONTENT STANDARD: *The student identifies career preparation and job acquisition skills required for employment, professional growth, and employment transitions in the field of business occupations.*

1. The student responds to a job announcement from a classified ad or Internet job site. Once the job is selected the student prepares the documents to put in a portfolio.

Specific Directions/Checklist for the Letter of Application

- create personal letterhead with appropriate graphics
- identify the job for which you are applying
- mention that your résumé is attached
- use concrete examples when stating the reason(s) you qualify for the job
- in closing, ask for a personal interview

Specific Directions/Checklist for the Résumé

- center your name, address, phone number and email address on top
- set up distinct sections for which you are able to provide information, requirements include personal information, objectives/goals, education background (e.g., skill course, major accomplishments), work experience, extracurricular or volunteer activities, skills or talents (e.g., bilingual), and reference list with full information of each person (i.e., complete name, address, telephone number)
- decide on résumé presentation (e.g., layout, style, typeface)

Portfolio Expectations

- ✓ accurate completion of required components
 - ✓ correct style in all documents
 - ✓ correct spelling, punctuation, grammar, and word usage
 - ✓ inclusion of required information
 - ✓ personal signature (where applicable)
 - ✓ overall presentation of required documents
 - ✓ overall presentation of portfolio
2. The student maintains a log of dates, times, and activities of extracurricular activities over a period of time with accurate information of
- ✓ dates times and activities
 - ✓ consistent record keeping during time period
3. The student, with a partner, participates in a mock interview. First, each student looks at the other student's portfolio and devises questions from the information gleaned from the résumé (e.g., objective, work experience, work skills, education). Then other general interview questions are considered, keeping in mind the interview questions that are not legal (i.e., marital status, age, religion). The day of the interview the student wears appropriate dress. In front of the class, the partners participate in the mock interviews. After each interview, other class members provide positive feedback and suggestions and determine if the interview went well enough to offer the student the job.
- ✓ participation as a team member
 - ✓ appropriate interview behaviors (appearance, composure, suitability, attitude, verbal and nonverbal cues)
 - ✓ interviewee selling self to interviewer
 - ✓ appropriate interview questions
 - ✓ appropriate responses to interview questions
 - ✓ participation as a team member

STRAND III: WORKPLACE SKILLS

CONTENT STANDARD: *The student identifies and demonstrates the factors essential to a productive workforce in a culturally diverse global environment.*

- 1–2. The student participates in a variety of class discussions. The first involves listing personal qualities that are necessary to maintain in the workplace. The second discussion involves responsible behavior related to employability. Using information from each discussion, the class creates a checklist. The checklist is then developed into log form that the student maintains over a period of time. Once the task is completed, the student writes a report on his/her strengths and weaknesses providing strategies to maintain the strengths and strategies to improve the weaknesses. The information is shared in a third discussion group—small group format. The student participates in a construc-

tive suggestion session after each student presentation to provide other strategies to maintain strengths and improve on weaknesses.

- ✓ completion of log
- ✓ participation in all discussion groups
- ✓ correct use of constructive suggestions
- ✓ reflective report on strengths, weakness and strategies
- ✓ ability to listen openly to other students' suggestions

3. The student develops a job list. Next to each item the student writes a name of a person who may have a connection or information about the job (e.g., qualifications, training, hiring status). The job networking list includes person's full name, complete address, phone number, name of company, and position.

- ✓ list of jobs
- ✓ accurate information on job contacts
- ✓ correct spelling of information

STRAND IV: ENTREPRENEURSHIP

CONTENT STANDARD: *The student examines the role of entrepreneurship and entrepreneur.*

1. Worksheet #12: Goal Setting

For the Business Plan, the student sets business goals and a life plan. The title of the worksheet is Goal Setting. He/She reports the goals and life plan in a written report.

Business Goals

- List three specific goals to achieve in the first month of business. When will you accomplish each goal?
- List three specific goals to achieve in the first six months of business. When will you accomplish each goal?
- List three specific goals to achieve in the first year of business. When will you accomplish each goal?
 - ✓ list of goals for each time period
 - ✓ discussion of goal accomplishment
 - ✓ clarity of communication

Life Plan

The student lists a variety of life goals (e.g., attending college, working full time, owning a house, getting married). After completing the list, the student chooses the top three and, in a written report, discusses when the goal will be accomplished and the strategies to be used for the accomplishment.

- ✓ list of life plan goals
- ✓ written reflection of life goals, each goal's timeline and strategy to accomplish it
- ✓ correct spelling, grammar, and punctuation

2. Worksheet #1: Executive Summary

The student writes an Executive Summary for the Business Plan. The student follows this outline:

- I. Introduction
 - A. Description of the Business

- B. Description of the Community
- II. Marketing Research
 - A. Description of the Study
 - B. Description of the Steps Taken to Design the Study
 - C. Description of the Steps Taken to Conduct the Study
 - D. Findings of the Study
- III. Proposed Marketing Plan
 - A. Description and Rationale for the New Service
 - B. Proposed Pricing Policies
 - C. Cost Analysis of the New or Expanded Service
 - D. Proposed Promotion Activities
 - E. Evaluation of the Marketing Plan
- IV. Bibliography
- V. Appendix

The student provides graphics (i.e., maps, charts, tables) where applicable. The student includes the Summary in his/her presentation of the Business Plan.

- ✓ completion of all components of outline of Business Plan
- ✓ appropriate format and writing style
- ✓ correct spelling, punctuation and grammar
- ✓ citations

3. Worksheet #3: Description of Product/Service

For the Business Plan the student briefly describes the product(s) and service(s) his/her business sells. The title of the worksheet is Description of Product/Service. Below the description, the student lists the products sold and the special features of each. He/She then attaches pictures or drawings of each product/service.

- ✓ complete list of products sold and each product's features
- ✓ accurate illustration of each product or service

4. Worksheet #2 : Background Information

For the Business Plan, the student develops a form that provides pertinent background information on the business he/she is planning. The title of the worksheet is Background Information. The form includes the following information: name of business, business slogan, brief description of business, business location, type of business, legal structure and reason for it, and owner(s) information (i.e., name(s), title, age and percentage of ownership).

- ✓ appropriate design of form
- ✓ completion of each required component
- ✓ correct spelling, punctuation and grammar

5, 6. Worksheet #13: Costs of Doing Business

For the Business Plan, the student determines the start-up costs as well as the fixed costs per month for the business. The title of the worksheet is Costs of Doing Business. Using a spreadsheet, the student first lists everything he/she needs in order to start the business. The

columns are Item, Quantity, and Cost. Tally up the total start-up costs. On another sheet, the student tallies up the fixed cost per month. The costs/columns are Utilities, Salaries, Advertising, Insurance, Interest, Rent, and Misc. He/She totals up the fixed costs per month.

- ✓ centered and bold titles
- ✓ correct input of formulas
- ✓ formulas copied in appropriate cell
- ✓ auto sum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places
- ✓ copy of worksheet
- ✓ copy of worksheet with formulas

STRAND V: COMMUNICATION

CONTENT STANDARD: *The student recognizes the importance of oral and written communication skills essential for interacting effectively in personal and professional situations.*

1–5. The student writes an Executive Summary for the Business Plan. The student follows this outline:

- I. Introduction
 - A. Description of the Business
 - B. Description of the Community
- II. Marketing Research
 - A. Description of the Study
 - B. Description of the Steps Taken to Design the Study
 - C. Description of the Steps Taken to Conduct the Study
 - D. Findings of the Study
- III. Proposed Marketing Plan
 - A. Description and Rationale for the New Service
 - B. Proposed Pricing Policies
 - C. Cost Analysis of the New or Expanded Service
 - D. Proposed Promotion Activities
 - E. Evaluation of the Marketing Plan
- IV. Bibliography
- V. Appendix

The student provides graphics (i.e., maps, charts, tables) where applicable. The student includes the Summary in his/her/ presentation of the Business Plan.

- ✓ accurate completion of outline
- ✓ correct spelling, punctuation, grammar, word usage and mechanics
- ✓ use of correct research practices (e.g., quoting and citing sources)
- ✓ use of appropriate presentation techniques

- 6–7. The student arranges for and/or listens to a variety of guest speakers from the business community (e.g., customer service, interview techniques, selling tips, bank security) throughout the year.
- ✓ recording major points made by speaker
 - ✓ use active listening techniques

STRAND VI: COMPUTATION

CONTENT STANDARD: *The student demonstrates the importance of computation skills in the development of his/her future role as an employee.*

1–7. Worksheet #17: Yearly Income Statement

For the Business Plan, the student designs and completes a yearly income statement. The title of the worksheet is Yearly Income Statement. The student follows the guidelines to design and complete the monthly income statement. The categories in the statement are Revenue, Variable Cost, Gross Profit, Fixed Costs (i.e., Utilities, Salaries, Advertising, Insurance, Interest, Rent, and Miscellaneous), Total Fixed Costs, Profit Before Taxes, Taxes (20%), and Net Profit. The student uses the following formulas and worksheets when computing the Monthly Income Statement.

Revenue = Revenue (Worksheet #16) x 12

Variable Cost = Variable Cost (Worksheet #16) x 12

Gross Profit = Revenue (Worksheet #17) – by Variable Cost (Worksheet #17)

Fixed Costs = Fixed Costs (Worksheet #16) x 12

Profit Before Taxes = Gross Profit (Worksheet #17) – Fixed Costs (Worksheet #17)

Taxes = Profit before Taxes (Worksheet #17) x .20

Net Profit = Profit Before Taxes (Worksheet #17) – Taxes (Worksheet #17)

- ✓ correct calculations
- ✓ completion of all components of form

8 – 11. Worksheet #14: Economics of One Sale

For the Business Plan, the student completes a three-step process. The title of the worksheet is Economics of One Sale.

Step 1: Using a spreadsheet, the student organizes the following information and produces the revenue results. The columns are Item, Selling Price, Quantity Sold in One Day, and Total Revenue. The student calculates the Total Number of the Quantity Sold and the Total Revenue.

Step 2: Using a spreadsheet, the student organizes the following information and produces the revenue results. The columns are Item, Variable Cost/Unit, Quantity Sold in One Day, and Total Variable Cost. The student calculates total Variable Costs.

Step 3: The student calculates the Average Variable Cost/Unit and the Average Gross Profit/Unit.

- ✓ centered and bold titles
- ✓ correct input of formulas

- ✓ auto sum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places
- ✓ copy of worksheet
- ✓ copy of worksheet with formulas
- ✓ correct calculations

12–13. Worksheet #10: Distribution System

For the Business Plan, the student develops a distribution system strategy. The title of the worksheet is Distribution System. The student lists the details for each supplier (i.e., name, location, and items available) and he/she creates a spreadsheet to organize the information. The student answers two questions, writing them in a summary report to attach to the spreadsheet.

- Where do you plan on keeping your inventory between sales?

- Describe your record-keeping system.

- ✓ suitable spreadsheet design
- ✓ inclusion of required information
- ✓ suitable summary report format
- ✓ centered and bold titles
- ✓ correct input of formulas
- ✓ formulas copied in appropriate cell
- ✓ auto sum totals
- ✓ widths of columns to best fit
- ✓ double border below totals
- ✓ thick border before column titles
- ✓ comma style with two decimal places
- ✓ copy of worksheet
- ✓ copy of worksheet with formulas

14. Worksheet #19: Venture Capital Request and Summary

For the Business Plan, the student determines the total start-up capital required. The title of the worksheet is Venture Capital Request and Summary. He/She copies and completes this form.

Total Start-Up Capital Required

\$ _____

The Total Start-Up Capital Required will be financed as follows:

Personal Savings

Family

Friends

Debt Financing (_____% Interest)

Equity Financing (_____% of Business)

Business Grant

Total Financing: \$

I am requesting \$_____ in the form of a Business Grant to be used as Start-Up Capital in the information of my business.

Closing Summary:

- ✓ correct computations
- ✓ comprehensive closing summary
- ✓ correct spelling, punctuation and spelling

STRAND VII: INFORMATION TECHNOLOGY

CONTENT STANDARD: *The student develops skills in the use of information technology and other tools to improve learning, achieve goals, and produce products and presentations.*

1. The student practices several methods of accessing and completing bank transactions using account/finance information technologies (e.g. WinTeller, More Teller, EZ Teller, IBM Bank Teller Business Components).
 - ✓ successful application of account/finance information technologies
 - ✓ understanding of various customer service banking related skills (e.g., managing customer account transactions, compute fees, reverse transactions, retrieval of information from Customer Information File).
2. The student uses basic application software when completing one of the required worksheets in the Business Plan. The student completes the worksheets in the following Strands: Strand I – Worksheets #1 and #16; Strand IV – Worksheets #1 - #3, #13, and #17 - #19; Strand VI – Worksheets #10, #14, and #15; Strand VIII – Worksheets #6, #7, and #11; Strand IX – Worksheets #4, #5, #8, #9 and #12.
 - ✓ correct selection of software application
 - ✓ suitable format or use of each software application
3. The student enters and manipulates numeric data using the touch method of a 10-key keypad when completing one of the required worksheets in the Business Plan. The student completes the worksheets in the following Strands: Strand IV – Worksheets #13, #17, #18, and

#19; Strand IV – Worksheet #14.

- ✓ correct information entered
- ✓ manipulated information to gain correct results
- ✓ technological techniques

4. The student finds, classifies and orders survey results based by completing Worksheet #5 of the Business Plan in Strand IX.

- ✓ completion of survey
- ✓ classification system

5–8. The student signs the district's acceptable use policy. The student then reads a summation of the safety and security policies as well as employee (if samples are available), federal and state regulations. The student participates in one of the groups in designing a poster to place in class. The groups are Rules for Safe and Appropriate Conduct on the Internet, Safety Policies on the Internet, Security Policies on the Internet, Federal Laws and Privacy, Privacy Information at Home and at Work.

- ✓ correct and relevant information on poster
- ✓ correct spelling, punctuation and grammar
- ✓ creative design of poster

STRAND VII: MANAGEMENT

CONTENT STANDARD: *The student identifies and practices the theories and principles of managing a business.*

1. Worksheet #11: Time Management

For the Business Plan the student maintains a weekly schedule to include these activity categories: school, business, job and personal activities. The title of the worksheet is Time Management. The student creates chart. The columns include Time, and all the days of the week. Under the Time column, the student uses half hour intervals starting at 7:30 AM and ending at 9:00 PM. Under each day of the week and next to the time slot the student fills in one of the activity categories.

- ✓ appropriate chart format for schedule
- ✓ completion of schedule

2. Worksheet #6: Management and Labor

For the Business Plan, the student creates a form to complete about the details of each key person who will manage the business. The title of the worksheet is Management and Labor. The required information includes the name of the person, the job title, the job description, and the experience and qualifications the person possesses. After the form(s) are completed, the student answers these questions:

- How much do you anticipate paying each person?
- What characteristics or qualities are required for each position?
- Do you plan on hiring anyone else in the future?
 - ✓ completion of all required information
 - ✓ correct spelling of information
 - ✓ reflective answers in complete sentences

Worksheet #7: Board of Advisors and Mentors

For the Business Plan the student deliberates the membership of his/her board of advisors and mentors. The title of the worksheet is Board of Advisors and Mentors. He/She answers the following questions and presents the responses in a report form.

- Do you plan on having a Board of Advisors?
- How many people do you expect to have on it?
- How often will you meet?
- Where will you meet?
- List the professions that you plan to have represented and name a potential member from each.
- Do you have a mentor? If yes, describe the person.
 - ✓ complete answers of all questions
 - ✓ correct spelling of professions and names of representatives
 - ✓ suitable format of report

STRAND IX: MARKETING

CONTENT STANDARD: *The student identifies and practices the theories and principles of marketing.*

1–2, 5. Worksheet #4: Market Analysis

The student writes a market analysis of his/her Business Plan by answering the following questions. Once the questions are answered, the student transfers the information into a written report including a graphic representation of at least one question from each section. The title of the worksheet is Market Analysis.

Customers:

- What is the age range of your target customer?
- What is the gender of your target customer?
- What is the income level of your target customer?
- Where does your target customer live?
- Who does your target customer buy now?

Competition:

- Who are your competitors?
- How do their prices compare to yours?
- How does their customer service compare to yours?
- What do your potential customers think of them?
- What is his/her greatest strength?
- What is his/her key weakness?
- What will your business specifically do to beat the competition?
 - ✓ complete answers to all questions in complete sentences
 - ✓ correct spelling, punctuation and grammar
 - ✓ appropriate graphic from each section

3–4. Worksheet #5: Survey Results

For the Business Plan, the student creates a survey of the target audience for his/her business. The title of the worksheet is Survey Results. Before the student sends out the survey, he/she tests it on a few people (e.g., family members, friends, schoolmates). Once the test survey is returned, the student brainstorms with them to see if they had problems answering any questions. The student refines the final survey and distributes it to the target audience.

Guidelines for the survey

- Keep the survey short.
- Use simple language.
- Write questions that everyone will understand.
- Start with an interesting question first.
- Avoid double negatives.
- If a list of choices is used, keep the list short.
- Use closed-ended questions rather than open-ended ones.
- Put the questions in logical order.
 - ✓ formal copy of survey
 - ✓ analysis of survey
 - ✓ compliance of survey guidelines

5–6. Worksheet #8: Marketing Strategy

For the Business Plan, the student determines his/her marketing plan. The title of the worksheet is Marketing and Strategy. The student reflects on two parts. For the Selling Tactics, the student first creates a checklist of all the ways he/she plans on selling his/her business (e.g., door to door, media ads, telephone sales). For the Advertising, the student lists the ways he/she plans on advertising his/her business (e.g., business cards, flyers, media ads, promotional give-aways). Finally, the student lists organizations he/she could join to help meet people to network. The student presents the information in a written report.

- ✓ completion of each part/list
- ✓ list of organizations/people for networking
- ✓ correct spelling of organizations and people
- ✓ Creativity

AND

5–6. Worksheet #9: Sample Flyer

For the Business Plan, the student creates a flyer for the business. The title of the worksheet is Sample Flyer. The flyer can serve many purpose (e.g., postings, mailings, personal invitations). The student identifies the purpose and designs the flyer accordingly.

Guidelines for Flyer

- Get input to write and design the flyer.
- Use a logical order in the design (i.e., top to bottom, left to right).
- Use point form.
- Use verbs.
- Write short sentences.
- Use graphics, pictures and/or photos.
- Ask for feedback about the flyer information from the intended audience.
 - ✓ adherence to guidelines
 - ✓ suitable and appealing design
 - ✓ correct spelling, grammar and punctuation
 - ✓ appropriate use of graphics, pictures and/or photos

STRAND X: LAW

CONTENT STANDARD: *The student identifies and demonstrates the basic principles of law relevant to business operations in a global economy.*

1. The student examines a local business's code of ethics obtained by the instructor. After reading the code, the student lists the ethics that apply to his/her school and personal environment.
 - ✓ correct list of ethics applying to home and school
2. The student listens to an expert on business crime. After the discussion, the student researches an example of a local case. He/She reports using the journalist form – Who? What? When? Where? Why? and How? The student summarizes the case and presents his/her findings to class.
 - ✓ active listening skills
 - ✓ use of research techniques
 - ✓ correct format and information of incident
 - ✓ correct spelling, punctuation, grammar
 - ✓ citations
 - ✓ effective presentations
- 3–4. The student reads a variety of real-life situations based on contract law, law of sales, and consumer law. The student determines what law(s) apply to each situation and explains his/her answer.
 - ✓ correct matching of law(s) with situations
 - ✓ adequate explanation of each decision

- 5–10. After a teacher led discussion on commercial paper, the student participates in a small group discussion on situation topics provided by the teacher. A sample is below. After the situation, the group selects a group's spokesperson to present its findings and conclusions.

Alternate Activity – The student, with a small group, creates a situation, trade with another group of students, and proceeds with the discussion and report of conclusions.

Sample Situation: An insurance company issues a claim check jointly to Wayne Simms and Alice Simms in the amount of \$50, 0000. Wayne forges Alice's endorsement on the check and deposits it in his/her joint checking account. One year later, Wayne and Alice are divorced and Alice realizes she never endorsed the insurance check. She contacts the depository bank, declares that her name was forged on the check, and demands payment from the bank. What is the bank's liability in this situation?

- ✓ understanding of the concepts negotiability and assignability
- ✓ application of concepts in real-life situations

Applied Marketing Research: Pathway Standards

The **Applied Marketing Research** course provides the student an opportunity to demonstrate skills needed by marketing management personnel. Areas of study include, but are not limited to, principles of research, research opportunities, research planning, and ethics. Literacy strategies (e.g., reading writing, speaking) are integrated throughout the curriculum.

References in parentheses refer to critical NM mathematics (CMS), science (CSS), and language arts (CLAS) content standards. the New Mexico Career Readiness Standards (CR), National Standards for Business Education (NBEA), and Albuquerque Public Schools (APS) Language Arts Standards (APS–LA).

STRAND I: PRINCIPLES OF RESEARCH

CONTENT STANDARD: *The student identifies and applies the principles of marketing research.*

- A. The student identifies, evaluates, and applies the principles of marketing research to create a marketing research project.
 - 1. Identifies one's own personal traits that are typical characteristics of a marketing research specialist (CR: 1A, 1C).
 - 2. Reads critically and independently (CLAS 14) to identify the reasons for conducting market research (NBEA–XII.5).
 - 3. Describes opportunities that lead to the need for in depth marketing research (CR: 1B).
 - 4. Describes the essential components of an investigation, including appropriate methodologies, proper equipment, and safety precautions (CSS 1) for conducting marketing research (NBEA–XII.5).
 - 5. Applies the steps in the problem-solving process to resolve a business problem (CR: 5E).
 - 6. Uses technologies to quantify relationships (CSS 5) and analyze the validity and reliability of market data collected (NBEA–XII.50).
 - 7. Uses a wide variety of information technology resources to retrieve information (CLAS 8,11,18)(NBEA–IX.7).

STRAND II: RESEARCH OPPORTUNITIES

CONTENT STANDARD: *The student develops a research project based on a selected need.*

- B. The student A) described how cultural differences, export/import opportunities, and current trends can affect the global marketplace and B) applies research principles in the development of his/her marketing research project.
 - 1. Reads critically and independently to draw conclusions (CLAS 14) and analyze the importance of using research (e.g., surveys, Internet) in marketing decision-making (CR: 2C; NBEA–XII.5).
 - 2. Designs and modifies (CSS 2) a product/service based on results of marketing research (CR: 1B, 2C; NBEA–VIII.B.2).
 - 3. Uses a variety of technology tools to present information (CLAS 27), define, and give examples of market segmentation, target markets, market share, business location, scarcity, and pricing (CR: 1B).
 - 4. Designs and conducts a scientific investigation that includes: testable hypothesis, controls and variables; methods to collect, analyze and interpret data (CSS 2) to determine potential users of specific products/services (CR: 2C).
 - 5. Uses discussion with peers as a way of understanding (CLAS 22) the importance of and ways to identify, obtain, and respond to customer feedback and concerns (CR: 4B).
 - 6. Uses a variety of techniques for researching topics including summarizing, cross referencing, and use of interactive technologies

- (CLAS 5) to investigate cutting-edge developments in marketing (CR: 3C; NBEA–XII.4).
- 7. Uses mathematical models (CSS 8) to describe the interrelationships between cost and price (CR: 1B; NBEA–VIII.4).
- 8. Reads critically and independently (CLAS 14) to define culture and develop an understanding of cultural differences (CR: 5C; NBEA–X.2).
- 9. Researches, defines, and presents (CLAS 16) information that describes the influences of other cultures on American business (CR: 1B; NBEA–X.2).
- 10. Compares and contrasts business practices in different cultures (CR: 5B; NBEA–X.2) and analyzes the interrelationship between science and technology (CSS 6).
- 11. Synthesizes and organizes information from a variety of sources (CLAS 19) to describe the concepts of export and import and global economic interdependence (CR: 1B; NBEA–X.D.4).
- 12. Uses language persuasively (CLAS 15) to describe the benefits/risks, trends, and opportunities in international trade (CR: 1B, 2C; NBEA–X.A).

STRAND III: RESEARCH PLANNING

CONTENT STANDARD: *The student develops a research plan for a business venture.*

- C. The student A) identifies and uses the necessary research methods needed in business and B) identifies and uses appropriate technology and records to make business decisions.
 - 1. Determines the resources needed and uses a variety of computational methods (CMS 1,7) to determine the costs of conducting needed research of a given product/service (CR: 2A, 2C).
 - 2. Identifies the reasons for keeping high quality business records, manually or electronically, and the possible consequences of not doing so (CR: 1B).
 - 3. Identifies, completes, compares, and contrasts the various types of business records (CR: 1B, 4C).
 - 4. Makes personnel and purchasing recommendations based on results of research data (CR: 2C; NBEA–XI.6B).
 - 5. Establishes short-term and long-term goals and a strategy for attaining these goals (CR: 2A, 5A; NBEA–XII.6).
 - 6. Develops the major components of a marketing research plan for an existing business venture (CR: 1B, 2A; NBEA–XII.6).
 - 7. Uses a variety of computational methods (CMS 1,7) to analyze a decision in terms of marginal costs and marginal benefits (CR: 2C) and represents the relationship using written and verbal expressions, tables, equations, and graphs (CMS 6).
 - 8. Defines skills and qualities needed for certain jobs and careers (CR: 1C, 1E).
 - 9. Uses discussion with peers (CLAS 22) to assess knowledge and skills within a group and evaluates team performance (CR: 2B, 5A).
 - 10. Identifies, evaluates, and selects training resources for appropriateness to needs and users (CR: 3C; NBEA–IX.14) and composes written arguments that develop and support (CLAS 30) the decision.
 - 11. Demonstrates a high level of effort and perseverance toward goal attainment, both individually and as a team member (CR: 2B, 2A).
 - 12. Demonstrates leadership within a group through effective communication, ability to motivate team members, and effective delegation of responsibility (CR: 2B, 2D).
 - 13. Makes a well-informed and well-organized formal presentation with a clear main point, adjusting the message, wording, and delivery to the particular audience and context (CLAS 29) to explain why motivation, leadership, communication, and trust are important to a team (CR: 5A, 5B).

STRAND IV: ETHICS

CONTENT STANDARD: *The student describes how ethics, government, and different forms of business ownership affect the research venture.*

- D. The student distinguishes between ethical and unethical practices and business environments.
1. Expresses an informed opinion that clearly states a personal view, is logical and coherent, and engages the readers and listeners interest (CLAS 25) to describe a personal code of ethical behavior (CR: 4A; NBEA–VIII.C).
 2. Uses an array of media and technologies, including print, (CLAS 24) to research and define ethics and common ethical issues that are encountered by a marketing research specialist (CR: 4A, 4D, 4E; NBEA–VIII.C).
 3. Develops a presentation by using clear questions and creative and critical research strategies (CLAS 28) to discuss examples of honest and dishonest business practices (CR: 4A; NBEA–VIII.C).
 4. Composes written arguments that develop and support an informed opinion (CLAS 30) to describe how government can affect business and marketing research decisions (CR: 1B; NBEA–VIII.B).
 5. Explains the rationale for government regulation of businesses (CR: 1B; NBEA–VIII.B).

STRAND V: LITERACY

CONTENT STANDARD: *The student communicates marketing research principles through multiple reading, writing, speaking, and research opportunities.*

- E. The student demonstrates proficiency in critical thinking, reading comprehension, specialized vocabulary, and a variety of writing, speaking and research opportunities.
1. Demonstrates command of reading strategies across content areas (APS–LA I.1).
 2. Evaluates the effectiveness of increasingly more sophisticated vocabulary in a variety of texts (APS–LA I.2).
 3. Reads a wide variety of informational texts (APS–LA I.3).
 4. Identifies and analyzes concepts in works as they relate to the reader (APS–LA II.5).
 5. Demonstrates fluency in using the writing process to create a final product (APS–LA III.1).
 6. Demonstrates fluency in using elements of effective writing (APS–LA III.2).
 7. Demonstrates fluency in using a variety of technology (APS–LA III.3).
 8. Demonstrates fluency in using writing conventions (APS–LA III.4).
 9. Demonstrates fluency with speaking strategies (APS–LA IV.1).
 10. Critiques text delivered electronically or visually (APS–LA V.1):
 - determines the source(s) of the information,
 - appraises the accuracy, purpose, and value of the messages, and
 - selects information to incorporate, use, and convey ideas in new ways.
 11. Uses a variety of sources to gather information (APS–LA VI.1).
 12. Continues to attribute sources of information in a variety of ways (APS–VI.3).
 13. Evaluates and defends research questions and topics (APS–LA VI.4).

Advance Applied Design: Assessment Illustrations

Note: These assessment illustrations include suggested activities for attaining each performance standard, with at least one key feature to look for while assessing student performance. A check (✓) refers to a key feature to look for while assessing student performance.

STRAND I: PRINCIPLES OF RESEARCH

CONTENT STANDARD: *The student identifies and applies the principles of marketing research.*

- 1, 2. The student reads a handout of the characteristics of successful research specialists (e.g., independent, self-confident, goal-oriented) and determines if research is right for him/her by assessing his/her strengths, weaknesses, interests and aptitudes. He/She can do this by listing strong and weak points on a piece of paper, asking other members of the class what they believe to be his/her strengths and weaknesses, and by taking aptitude tests. The student then submits a written assessment of what he/she discovered about himself/herself.
 - ✓ analysis
 - ✓ personal insights
 - ✓ effective writing elements
- 3, 4, 6, 7. Using a variety of resources (e.g., books, business trade magazines, business owners), the student examines different business opportunities that were successful and orally presents to the class his/her findings.
 - ✓ support for argument
 - ✓ clarity
 - ✓ resourcefulness
 - ✓ clear communication
 - ✓ use of technology
5. The student assumes the role of applying for a position in an online business that has opened in his/her community. In his/her preparation for an interview, he/she describes a situation where he/she had to solve a problem, how it was handled, and the results. Also see Strand III, illustration for performance standards # 8, #9, #11 - #13.
 - ✓ problem-solving strategies
 - ✓ effective communication

STRAND II: RESEARCH OPPORTUNITIES

CONTENT STANDARD: *The student develops a research project based on a selected need.*

- 1–4. The student reads about Procter & Gamble's (P&G) history and their products, takes notes, and presents findings to the class. Presentation includes some of P&G's original products, how many products they market today, how many consumers use their products, how many countries sell their products, an example of a product that became obsolete and was discontinued, and why it became obsolete. After the presentation, the student generates discussion around questions (e.g., Which P&G products do you or your family use? What are ways to help P&G improve its products?).
 - ✓ analysis

- ✓ facilitation skills
- ✓ relevance of information

One way for an entrepreneur to learn how to run a successful business is to go to business experts for help and information. To gain on-hands experience, the student finds the Web site for *Entrepreneur* magazine and finds out what kinds of information this publication and Web site offers to entrepreneurs. The student summarizes his findings and critiques the value of this Web site.

- ✓ analysis
- ✓ clear communication and expression of ideas

5. See Strand III, Illustration for performance standards # 8, #9, #11 - #13.
6. Part of marketing is being able to develop, promote, and distribute a product. To understand this concept better, the student locates the Web site for the American Marketing Association (AMA), reviews the organization's information, finds out what resources they offer, and summarizes the information (orally or written) to include the site address, what the association is, a description of its resources, when it was founded, its mission statement, its three quarterly business publications, what AMA offers at its Information Center, two awards offered by them, how many professional chapters it has, and the address of the AMA professional chapter closest to the student. The student shares the information and engages in a discussion considering how might the AMA be helpful, how the Web site might be used, and the benefits of joining one of its Collegiate Chapters if the student were studying marketing in college.
 - ✓ accurate information
 - ✓ individual participation
 - ✓ technological skills
 - ✓ conceptual understanding of marketing elements
7. The student selects a retailer to interview about how prices are set for the customer and shares the information in a class discussion. Through prepared questions, the student solicits from the retailer how much the business pays for a specific item, the percentage markup, and the customer's price.
 - ✓ relevant information
 - ✓ appropriate questions
 - ✓ active participation in discussions
- 8–10. Working side-by side with a variety of people allows an individual to get to know these people personally and professionally, but issues can arise. To better understand diversity training, the student finds out what diversity training is, what it can do, who benefits from this training, the reasons for the training, the advantages and the importance for the training, different ways the training can take place, and the components of these programs. After completion of the study, the student shares the information with the class and generates a discussion to get the other students to thinking about such ideas as which are the most interesting diversity issues, ways to understand diversity, and whether or not diversity issues are easy or difficult to resolve.
 - ✓ skills (e.g., research, communication, leadership, critical thinking)
 - ✓ relevance of information
 - ✓ all required components
 - ✓ individual participation
 - ✓ cultural understanding

- 11, 12. The student selects a country to determine its type of government, people, economy, imports, exports, and currency. He/She presents findings to the class with rationale for the selection, what goods, if any, have been purchased from that country, and whether or not the student has personally benefited from international trade with the chosen country.
- ✓ effective presentation
 - ✓ accuracy of information
 - ✓ rationale

STRAND III: RESEARCH PLANNING

CONTENT STANDARD: *The student develops a research plan for a business venture.*

- 1–3, 5-10. The student devises a business plan to include the following components: a marketing plan (e.g., advertising and promotion), a management plan (e.g., employees), financial plan (e.g., budgets, loan applications), advantages for developing the plan, and marketing tips, tricks, and traps. Since the activity itself can be detailed and lengthy, the student needs to just sketch an outline of his/her plan. He/She provides handouts to facilitate and guide the assignment.
- ✓ inclusion of all required components
 - ✓ creativity and ingenuity
 - ✓ feasibility
 - ✓ break-even analysis
 - ✓ cost of credit analysis
 - ✓ IRS regulations for record keeping
 - ✓ goals, mission statement, vision statement
4. Many consumers use the Internet for shopping because it is quick, convenient, and provides access to a much larger selection of products than can be found at the mall. The student selects an item, uses the Internet to shop for it, and writes a summary of his/her experience. Points to include in the written summary: Web site address of the retailer found, what products this retailer sells, the price of three other items the student would like to buy from that retailer, the return policy of the retailer, is a credit card offered, advantages and disadvantages to shopping on the Internet, and a comparison to shopping by catalog.
- ✓ inclusion of all required elements
 - ✓ technology skills
 - ✓ clarity in communication
 - ✓ effective writing conventions (e.g., grammar, spelling, punctuation)
- 8, 9, 11-13. Using the student's experiences, the class discusses and charts various types of conflicts that can arise in a relationship and ways in which people can work through their differences. The student relates those situations to a workplace scenario to see if they transfer to coworker to coworker, company to vendor, and company to company. With those ideas implanted in his/her head, the student pursues further examination of the ideas through research (e.g., articles, Web sites) to validate or change the opinions formulated. The class reconvenes to test and compare their original ideas with what was learned. Discussion centers around similarities and differences found, techniques used that were successful or not, and how one might resolve differently a future conflict.
- ✓ brainstorming skills
 - ✓ individual participation
 - ✓ conflict resolution techniques

- ✓ effective communication
- ✓ team work and leadership skills

Extension: The student, working in small groups, writes a 5-10 minute skit that demonstrates conflict management, performs the skit in front of the class, and then analyzes and suggests how well the conflict was resolved.

- ✓ teamwork/collaboration
- ✓ effective writing elements
- ✓ problem-solving strategies
- ✓ analysis/insights
- ✓ effective presentation

STRAND IV: ETHICS

CONTENT STANDARD: *The student describes how ethics, government, and different forms of business ownership affect the research venture.*

- 1–3. The student assumes the role of “troubleshooter” at a work site. He/She identifies three examples of ethical work habits and three examples of unethical work habits observed at the work site and reports findings to a small group of students in the class.
 - ✓ recognition of ethical practices
 - ✓ presentation

- 4, 5. The student reads an article in a current newspaper or magazine about government regulations of business and answers the following questions:
 - What is the situation presented in the article?
 - What industry is involved?
 - What regulatory agency is involved and why?
 - What regulations are being violated?
 - Who is the regulatory agency protecting?
 - How does the business/industry defend its position?
 - How does the government defend its position?
 - What is your reaction to the claims?
 - How would you solve this situation?
 - ✓ understanding of government regulations
 - ✓ responses to all questions
 - ✓ insights

STRAND V: LITERACY

CONTENT STANDARD: *The student communicates marketing research principles through multiple reading, writing, speaking, and research opportunities.*

1–4. See Strand I, the 1st illustration; Strand II, the 1st illustration; and Strand IV, the 2nd illustration.

5–8. See Strand I, the 2nd illustration; Strand II, the 2nd illustration and the illustration for performance standard #6; and Strand III, the 1st and 2nd illustrations.

9. See Strand I, the 2nd illustration; Strand II, the 1st illustration and the illustrations for performance standards #6, #7, and #8 – #10; Strand III, the 3rd illustration; and Strand IV, the 1st illustration.

10. See Strand II, the illustration for performance standard #6 and Strand III, the 2nd and 3rd illustrations.

11–13. See Strand II, the 2nd illustration and the illustrations for performance standards #6 and #8 – #10; and Strand III, the 2nd illustration.

Although the above are representative examples of where the literacy standards are being met, the student has multiple opportunities in every strand to meet the literacy standards.