# Courses of Study
# For
# Business Management

## Courses in the Business and Administrative Services

- Business Foundations 141000
- Marketing Principles 144000
- Management Principles 141025
- Office Management 142005

(Internship work experience is offered in the Office Management course)

**CTPD 023**

**WEST SHORE CAREER -TECHNICAL DISTRICT**
**LAKEWOOD, OHIO 44107**

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**Acknowledgements**
**(Program)**
**West Shore Career - Technical District**

Sincere appreciation goes to the following individuals for their assistance and cooperation in preparing this Business Management program's course of study.

Example:

Lakewood Board of Education, Lakewood City Schools
Mr. Jeffrey Patterson, Superintendent, Lakewood City Schools
Mr. Keith Ahearn, Lakewood High School Principal
Linda Thayer, Coordinator, West Shore Career and Technical
Mrs. Vicki Plute, Instructor, Business Management

And the Business Management Advisory Committee:

| | | | |
|---|---|---|---|
| **Darren Goats** | **Former student, industry** | **Laura Whitkofski** | **Educational aide,** |
| **John Sweo** | **Industry, community member** | **Patty Ryan** | **Employer-Chamber of Commerce** |
| **Christina Kowalski** | **Industry** | **Deborah Brauer** | **Employer-banking** |
| **Mike Chase** | **Industry** | **Brittany Pearsall** | **Tri-C representative** |
| **Mark Sattele** | **Business Ed. Publisher Rep--Cengage** | **Nina DeChant** | **Guidance** |
| **Joe Stepan** | **Employer--accounting** | **Ron Rerko** | **Parent** |
| **Morgan Rerko** | **Current student** | | |

For her helpful suggestions and encouragement: Donna Richmond, Retired Professor Kent State University

# Recommendation of Advisory Committee
# Business Management
# West Shore Career & Technical District

The Career & Technical Advisory Committee of the Business Management Program, West Shore Career & Technical District, has reviewed this course of study and recommends it for use as the foundation for instruction in classroom, laboratory, and cooperative occupational experiences.

The developers of the course of study have considered local labor market needs and the school district's ability to offer specialized programs. The competencies found in business content standards for this program have been reviewed and accepted as being congruent with our school district's philosophy and student Outcome/I Can measures.

We believe that this course of study adequately and correctly focuses upon the development of technical competencies, attitudes, values, and appreciation's critical to successful employment in the business realm.

After reviewing this document, we recommend that the Business Management Course of Study be approved and adopted on 7/21/15.
(Date)

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# Resolution
## Business Management
## West Shore Career & Technical District

WHEREAS, the Business Management Advisory Committee of the Lakewood City Schools has reviewed the Business Management Course of Study, and WHEREAS, the course of study is based upon the Career Content Standards Competencies for Business and Administrative Services

- Business Foundations 14100
- Marketing Principles 14400
- Management Principles 141025
- Office Management 142005

WHEREAS, the Business Management Advisory Committee has reviewed these competencies and has edited competencies to address local labor market needs, and to acknowledge the school district's ability to offer specialized programs,

NOW, THEREFORE, BE IT RESOLVED, in accordance with the superintendent's recommendation, that the *Lakewood City Schools* adopt the *Business Management* Course of Study.

Approval date: 7/20/15

Superintendent

Board President

**MISSION STATEMENTS**
**Business Management**
**WEST SHORE CAREER AND TECHNICAL EDUCATION DISTRICT**

## Mission of Lakewood City Schools

In partnership with our families and community, Lakewood City Schools will develop responsible citizens, who are critical and creative thinkers, committed to life-long learning, invested in a diverse society, and prepared for technological and global opportunities.

## West Shore Career Technical District Mission Statement

The many enhancements to the West Shore Career-Technical District facility, technology, and curriculum support the ongoing mission of our teachers, administration, and staff to provide excellent educational opportunities and meaningful real-world experiences while preparing students for success in the global marketplace of the 21st century.

## CAREER AND TECHNICAL EDUCATION GOALS
### Business Management
### WEST SHORE CAREER AND TECHNICAL EDUCATION DISTRICT

- Offer relevant, hands-on learning opportunities which align with student career interests and regional workforce development needs
- Prepare career-tech student for post-secondary opportunities or to directly enter the workforce.
- Maintain active advisory committees which offer overall curriculum direction and specific occupational knowledge of competencies required for each industry specific committee
- Offer career exploration opportunities to expose students to career
- Upgrade career-technical labs to align with industry standards
- Provide on-going industry training and development opportunities for career-tech staff to stay abreast of industry advancements and teaching methods.

# PROGRAM DESIGN
# Business Management
# WESTSHORE CAREER AND TECHNICAL EDUCATION DISTRICT

## PROGRAM PHILOSOPHY:

We believe that the Business Management program provides 11th and 12th grade students with a pathway from high school to college and onto careers in order to meet the demands of today's high tech complex business society. The curriculum includes skills that are critical to success in today's business office: professionalism, communication skills, office management, management functions, accounting, human resources, marketing, and risk management.

## PROGRAM GOALS:

Program goals for students attending the West shore Career and Technical school include:

- Students will develop the skills, knowledge, attitudes, and values sufficient to secure employment and/or pursue post-secondary education in the field of their choice.
- Students will develop, expand, and refine math, science, and communication skills through application appropriate to the world of work and necessary for everyday success.
- Student will demonstrate occupational competencies at a level of proficiency acceptable to the employment market and to demonstrate the ability to adapt, retrain, and advance in an ever changing work environment.
- Students will demonstrate an understanding of positive work ethics, attitude, self-concept, and preserve mental and physical health as it relates to the processes of managing work, family, and use of leisure time.
- Students will participate in career and technical student organization activities to the extent of improved skills, knowledge, and self-concept needed for success
- Students will demonstrate communication and basic computer operations skills to solve problems that will be encountered on a day to day basis
- Students will receive exposure to "high tech" procedures needed to meet the demands of business and industry.
- Students will value the free enterprise system and know they are able to work as entrepreneurs as well as employers.
- Students who are educationally, economically, and/or physically disadvantaged are mainstream unless the disability prevents the student from benefiting from the program or creates a significant safety hazard to self or other students

### Overview of Program

The Business Management Program is a two-year program designed for 11th and 12th grade students who are interested in pursuing post-secondary education upon graduation. Senior students will be scheduled for internships in a business field. With the available Tech Prep option, students can earn up to six college semester credit hours while in high school.

In the 11th and 12th grade component of the Tech Prep program, all students are part of a seamless curriculum, which allows student to transition into post-secondary programs. Each competency and competency builder in the required curriculum is designated to be introduced, reinforced, or mastered at various levels. The four areas of instruction include

- Business Foundations 14100
- Marketing Principles 14400
- Management Principles 141025
- Office Management 142005

Throughout the school year, students participate in a variety of work-based learning in order to observe and interact with employees, employers and administrative personnel in order to learn more about the industry as a whole. Early placement/ internships/ mentoring assignments/ job shadowing are all examples of work-based opportunities.

Students are encouraged to take the proper classes so that they are prepared for their next step in their educational careers. The following pathway chart is a recommended sequence for students interested in this career field.

| 9th Grade | 10th Grade | 11th Grade | 12th Grade |
|---|---|---|---|
| English 9 | English 10 | English 11 | English 12 |
| Algebra 1 or Geometry | Geometry or Algebra II | Algebra II or Pre-Calculus | Government |
| Physical Science | Biology | Chemistry or Physics | Finance Foundations |
| World History | U.S. History | Social Studies Elective | Elective |
| Foreign Language | Foreign Language | Business Foundations<br>Marketing Principles<br>Management Principles | Office Management/Senior Internship |
| Computer Applications/Digital Media | Finance Foundations/ Computer Applications | | |
| Music/ Art/ PE | Music/Art /PE | | |
| | Health | Computer Programming/ Literacy | |

## Population Served

The Business Management program is open to all 11th and 12th grade students as long as they are not a safety hazard to self and others in the class who have successfully completed Algebra I as a prerequisite. Students from the West Shore consortium are eligible to enroll in these programs as well. The school districts are Rocky River, Bay Village, Lakewood, and Westlake.

## Housing of the Program

- Classroom and laboratory
- Fieldtrips to provide learning experiences outside the classroom
- Partnership with business to provide an additional hands-on training
- Early placement also provides learning experiences outside the classroom

## Supervisor of the Program

The teacher of the Business Management program reports directly to the West Shore Career and Technical Director, William DiMascio , and building principal, Keith Ahearn

**Occupations Addressed**

| High School Exit Careers | Associate Degree Exit Careers | Baccalaureate Degree Exit Careers |
|---|---|---|
| Customer Service | Inventory Control | Sales Manager |
| Retail Sales / Manager | Record Keeping | Industrial Sales |
| Wholesale Sales | Financial Planning | Manufacturers Representative |
| Entrepreneur | Entrepreneur | Entrepreneur |

**Basic Program Operation**

Provide classroom instruction and external internship experience. Develop fundamental knowledge, skills, abilities, values, and attitudes in entrepreneurship, leadership, and employability skills. In both the junior and senior years, class is 80 minutes a day for a total of 6.6 hours per week. In the senior year, qualifying students are given the opportunity to secure an internship in an actual office, retail, or service setting for a total of at least 6.6 hours per week.

**Articulation Agreements**

Articulation agreements have been developed between West Shore Career and Technical District and Cuyahoga Community College. There is on-going dialogue following the established process and procedures between our school and each participating post-secondary institution to develop and maintain articulation agreements. The procedure can include post-secondary options, waiver of classes or other formats providing time-shortened or advanced skill associate degree paths.

**Technology**

Technology is an integral part of the Business Management program. Computer hardware and software are maintained as state-of-the-art instructional delivery of curriculum through technology is the norm for this class.

**Integrated Academics**

Academics are taught outside the CTE program by a licensed teacher, however, is integrated as part of this program in order to raise standards. Math, Science, English and Communications skills are essential and integral parts of the program competencies.

**Student Leadership**

It is anticipated that students will:
-participate in club related activities
-work with classmates on service projects
-develop teamwork skills

**Critical Thinking and Decision Making**

Develops the use of critical thinking skills in making wise decisions as an integral part of classroom instruction and laboratory learning activities
Teaches decision-making techniques through problem solving, case studies, and real life experiences

**Statement of Modifications**

Significant academic accommodations and/or modifications of competency to the Business Management curriculum may limit or prevent successful training and/or future employment options in this area. Also accommodations and/or modification necessary for physical limitations and/or social work behaviors may also limit or prevent successful training and/or future employment options in this area.

**Disclaimer Statement**

This Course of Study conforms to all federal, state and local laws and regulations including Title IX and non-discrimination against any student because of race, color, creed, sex, religion, citizenship, economic status, married status, pregnancy, handicap, other physical characteristics, age or national origin. This policy of nondiscrimination shall also apply to otherwise qualify handicapped individuals.

# SCOPE AND SEQUENCE

# BUSINESS FOUNDATIONS

# 141000

This is the first course for the Business and Administrative Services, Finance and Marketing career fields. It introduces students to specializations within the three career fields. Students will obtain knowledge and skills in fundamental business activities. They will acquire knowledge of business processes, economics and business relationships. Students will use technology to synthesize and share business information. Employability skills, leadership and communications and personal financial literacy will be addressed.

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| **Outcome/ I Can** | **1.1** | **Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings. |
| **Competencies** | 1.1.1 | Identify the knowledge, skills and abilities necessary to succeed in careers. |
| | 1.1.2 | Identify the scope of career opportunities and the requirements for education, training, certification, licensure, and experience. |
| | 1.1.3 | Develop a career plan that reflects career interests, pathways, and secondary and postsecondary options. |
| | 1.1.6 | Explain the importance of work ethic, accountability, and responsibility and demonstrate associated behaviors in fulfilling personal, community and workplace roles. |
| | 1.1.11 | Recognize different cultural beliefs and practices in the workplace and demonstrate respect for them. |

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| **Outcome/ I Can** | **1.2** | **Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration. |
| **Competencies** | 1.2.3 | Identify and use verbal, nonverbal, and active listening skills to communicate effectively. |
| | 1.2.5 | Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose. |
| | 1.2.6 | Use proper grammar and expression in all aspects of communication. |
| | 1.2.10 | Use interpersonal skills to provide group leadership, promote collaboration, and work in a team. |

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| **Outcome/ I Can** | **1.4** | **Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations. |
| **Competencies** | 1.4.2 | Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines). |

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| **Outcome/ I Can** | **1.6** | **Business Literacy:** Develop foundational skills and knowledge in entrepreneurship, financial literacy and business operations. |
| **Competencies** | 1.6.4 | Identify types of businesses, ownership, and entities (i.e., individual proprietorships, partnerships, corporations, cooperatives, public, private, profit, not-for-profit). |
| | 1.6.7 | Identify the effect of supply and demand on products and services. |

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| **Outcome/ I Can** | **1.9** | **Financial Management:** Use financial tools, strategies and systems to develop, monitor, and control the use of financial resources to ensure personal and business financial well-being. |
| **Competencies** | 1.9.1 | Create, analyze, and interpret financial documents (e.g., budgets, income statements). |
| | 1.9.2 | Identify tax obligations. |
| | 1.9.3 | Review and summarize savings, investment strategies and purchasing options (e.g., cash, lease, finance, stocks, bonds). |
| | 1.9.4 | Identify credit types and their uses in order to establish credit. |
| | 1.9.5 | Identify ways to avoid or correct debt problems. |
| | 1.9.6 | Explain how credit ratings and the criteria lenders use to evaluate repayment capacity affect access to loans. |
| | 1.9.7 | Review and summarize categories (types) of insurance and identify how insurances can reduce financial risk. |
| | 1.9.8 | Identify income sources and expenditures. |
| | 1.9.9 | Compare and contrast different banking services available through financial institutions. |

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| **Outcome/ I Can** | **2.1** | **Business Activities:** Relate business functions to business models, business strategies and organizational goal achievement. |
| **Competencies** | 2.1.1 | Explain the reasons that businesses and organizations exist and their role in society, and describe types of business models. |
| | 2.1.2 | Describe the business changes that are occurring in response to the external environment in which businesses operate. |
| | 2.1.3 | Describe types of business activities, or functions (e.g., accounting, finance, human resources management, information management, marketing, operations, sales and strategic management); the interactions among business functions, or activities; and the differences in implementation that occur in big versus small business. |
| | 2.1.4 | Explain forces that are driving business changes (e.g., globalization, consumer demand, government policies, political climate, diversity, spending trends, industry structure changes) and how organizations are adapting to today's business environment (e.g., proactive management, competitive aggression, innovative management, agile management, organizational learning, market orientation, slack resources). |
| | 2.1.5 | Describe the need for and role of accounting and finance (e.g., understanding accounting treatment, verifying information, analyzing variances, guiding decision-making), and explain how they interact with and impact other business activities or functions. |

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| | 2.1.6 Explain the role and function of human resources management, describe its interactions with other functional areas, and identify its contributions to an organization.<br>2.1.7 Explain the nature and scope of information management and its contributions to business operations.<br>2.1.8 Describe marketing's role and function in business and its contributions to overall business strategy.<br>2.1.9 Explain factors that motivate customers, clients and businesses to buy and actions employees can take to achieve the company's desired results.<br>2.1.10 Describe connections among business ethics, actions and results (e.g., influencing consumer behavior, gaining market share).<br>2.1.12 Explain the nature of management and levels of management (e.g., front line, middle management, executive).<br>2.1.13 Identify ways that technology impacts business activities. |

| **Outcome/ I Can** | **2.2** **Economic Principles:** Relate principles and concepts of applied economics to business models, business activities and organizational goal achievement. |
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| **Competencies** | 2.2.1 Describe the concepts of economic goods and services, economics and economic activities (i.e., production, distribution, exchange, consumption and circular flow of income model).<br>2.2.2 Explain types of economic resources, competition and economic systems (e.g., traditional, command, market), the systems' characteristics, their advantages and disadvantages and impact on business.<br>2.2.4 Determine economic utilities created by business activities (e.g., time, place, possession, form or task).<br>2.2.5 Determine types of business risks (e.g., pure, speculative, natural, human, economic).<br>2.2.6 Distinguish between gross and net profit, identify factors affecting a business's profit (e.g., demand, chance, pricing, expenses, costs, the economy), and recognize controllable and non-controllable expenses.<br>2.2.7 Determine the relationship between government and business, identify government agencies that facilitate trade, and describe the impact of government regulations on business activities.<br>2.2.9 Explain the concept of productivity, how it is measured and its importance to business. |

| **Outcome/ I Can** | **2.3** **International Business:** Relate factors impacting international business to internal business operations, practices and strategies. |
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| **Competencies** | 2.3.1 Describe the global environment in which businesses operate, identify leading economies, and explain how the global environment impacts a business's overall global strategy. |

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| **Outcome/ I Can** | 2.4 | **Business Processes:** Relate business process design to organizational structure and organizational goal achievement. |
| **Competencies** | 2.4.2 | Identify types of business processes, their purposes (e.g., added customer value, increased efficiencies), their characteristics, their components (e.g., events, activities, decision points, metrics) and their interrelationships. |

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| **Outcome/ I Can** | 3.1 | **Customer Relations**: Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships. |
| **Competencies** | 3.1.1 | Explain the nature of positive customer or client relations and their role in keeping customers, and describe the importance of meeting and exceeding customer expectations. |

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| **Outcome/ I Can** | 3.2 | **Relationship Management**: Apply techniques and strategies to develop, maintain and grow positive relationships with employees, peers and stakeholders. |
| **Competencies** | 3.2.8 | Describe the nature of organizational culture and its impact on business, and interpret and adapt to a business's culture. |

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| **Outcome/ I Can** | 3.4 | **Social Media Communications**: Apply tools, strategies and processes to plan, create, implement, monitor and evaluate social media communications to support corporate brand and strategy. |
| **Competencies** | 3.4.1 | Describe the impact of a person's social media brand on the achievement of organizational goals. |
| | 3.4.2 | Compare and contrast the use of social media for personal and business purposes. |

# SCOPE AND SEQUENCE

## MARKETING PRINCIPLES

## 14400

This is the first course in the Marketing career field. It introduces students to the specializations offered in Marketing. Students will obtain fundamental knowledge and skills in marketing communications, marketing management, marketing research, merchandising and professional selling. They will acquire knowledge of marketing strategies, market identification techniques, employability skills, business ethics and law, economic principles and international business. Technology, leadership and communications will be incorporated in classroom activities.

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| **Outcome/ I Can** | **1.1 Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings. |
| **Competencies** | 1.1.2 Identify the scope of career opportunities and the requirements for education, training, certification, licensure, and experience.<br>1.1.3 Develop a career plan that reflects career interests, pathways, and secondary and postsecondary options. |

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| **Outcome/ I Can** | **1.2 Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration. |
| **Competencies** | 1.2.3 Identify and use verbal, nonverbal, and active listening skills to communicate effectively.<br>1.2.5 Communicate information (e.g., directions, ideas, vision, workplace expectations for an intended audience and purpose.<br>1.2.6 Use proper grammar and expression in all aspects of communication.<br>1.2.7 Use problem-solving and consensus-building techniques to draw conclusions and determine next steps.<br>1.2.10 Use interpersonal skills to provide group leadership, promote collaboration, and work in a team. |

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| **Outcome/ I Can** | **1.3. Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance. |
| **Competencies** | 1.3.4. Identify how federal and state consumer protection laws affect products and services.<br>1.3.6. Identify deceptive practices (e.g., bait and switch, identity theft, unlawful door-to-door sales, deceptive service estimates, fraudulent misrepresentations) and their overall impact on organizational performance. |

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| **Outcome/ I Can** | **1.4 Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations. |
| **Competencies** | 1.4.2 Select and use software applications to locate, record, analyze and present information (e.g., word processing, electronic mail, spreadsheet, databases, presentation, Internet search engines). |

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| **Outcome/ I Can** | **1.11 Principles of Business Economics:** Examine and employ economic principles, concepts, and policies to accomplish organizational goals and objectives. |
| **Competencies** | 1.11.2 Identify the difference between monetary and nonmonetary incentives and explain how changes in incentives cause changes in behavior.<br>1.11.9 Describe how laws and regulations influence domestic and international trade. |

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| **Outcome/ I Can** | **2.2** | **Economic Principles**: Relate principles and concepts of applied economics to business models, business activities and organizational goal achievement. |
| **Competencies** | 2.2.8 | Describe the nature of taxes paid by businesses and their impact. |
| | 2.2.10 | Analyze the impact of specialization and division of labor on productivity. |
| | 2.2.11 | Explain reasons that labor unions form, analyze their impact on business, and describe types of negotiation strategies used in the collective bargaining process. |
| | 2.2.12 | Explain the impact of the law of diminishing returns and the concept of economies of scale. |
| | 2.2.13 | Describe the types of market structures (e.g., monopolistic, monopsonistic). |
| | 2.2.15 | Describe the phases of business cycles (i.e., expansion, peak, contraction, trough) and industry cycles (i.e., start-up or innovations, dominance, shakeout or consolidation, maturity, decline), benefits of understanding them, their internal and external causes, their impact on business and ways businesses deal with different phases. |

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| **Outcome/ I Can** | **2.3** | **International Business**: Relate factors impacting international business to internal business operations, practices and strategies. |
| **Competencies** | 2.3.1 | Describe the global environment in which businesses operate, identify leading economies, and explain how the global environment impacts a business's overall global strategy. |

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| **Outcome/ I Can** | **2.4** | **Business Processes:** Relate business-process design to organizational structure and organizational goal achievement. |
| **Competencies** | 2.4.4 | Describe the relationship among policies, processes and procedures. |

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| **Outcome/ I Can** | **3.3** | **Business Communications Management**: Apply strategies and procedures to plan, create, implement, and evaluate internal and external company communications. |
| **Competencies** | 3.3.5 | "Sell" ideas to internal and external audiences. |

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| **Outcome/ I Can** | **5.1** | **Marketing Fundamentals:** Describe principles of marketing, marketing functions and the factors influencing their effectiveness. |
| **Competencies** | 5.1.1 | Identify marketing functions, their interrelatedness, their overall contributions to business strategy and the metrics used to measure success. |
| | 5.1.2 | Identify legal and ethical issues associated with marketing activities or functions, describe the organizational values impacted, and identify the marketing-mix components (e.g., product, price, promotion, place) affected. |
| | 5.1.3 | Explain the nature, scope, benefits and considerations in channel management (e.g., how channels perform or interact). |

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| | 5.1.4 Describe the marketing-information management function, its nature and considerations (e.g., types of relevant information, uses, legal and ethical concerns).<br>5.1.5 Describe the function of pricing to understand its role in marketing.<br>5.1.6 Explain factors affecting pricing decisions (e.g., customer value perception, brand, negotiating power, corporate policies, competitive strategy, stage of customer life cycle).<br>5.1.7 Describe foundational concepts associated with product and service management to understand its nature and scope (e.g., product life cycles).<br>5.1.8 Explain the drivers of brand and the impact, benefits and drawbacks of branding.<br>5.1.9 Describe promotion's nature, scope and role in meeting business objectives (e.g., types of promotion, promotional mix, promotional channels).<br>5.1.10 Describe the impact of industry, environment and culture on the nature and scope of selling and sales activities (e.g., customer service, relationship building).<br>5.1.11 Describe sales processes and techniques that can be used to facilitate selling.<br>5.1.12 Explain the impact of technology on marketing costs, marketing strategy and marketing return on investment. |

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| **Outcome/ I Can** | 5.2 **Channel Management:** Apply the concepts and processes needed to identify, select, monitor and evaluate distribution channels that support achievement of organizational goals and objectives. |
| **Competencies** | 5.2.1 Distinguish among distribution channels for consumer goods, industrial goods and services. |

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| **Outcome/ I Can** | 5.3 **Marketing Information Management:** Apply the concepts, systems and tools needed to gather, synthesize, evaluate and disseminate marketing information for use in making business decisions that achieve organizational goals and objectives. |
| **Competencies** | 5.3.1 Distinguish between market-driven and customer-driven information, and explain the need for marketing information.<br>5.3.2 Describe the factors that determine the relevancy of information for marketing purposes.<br>5.3.3 Describe data and reports that are monitored for marketing decision-making. |

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| **Outcome/ I Can** | 5.4 | **Marketing Research:** Apply qualitative and quantitative research methods, techniques and tools to gather, synthesize, evaluate and disseminate information about a specified problem, issue or opportunity for use in making business decisions that achieve organizational goals and objectives. |

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| **Competencies** | 5.4.1 | Explain reasons for conducting marketing research and the importance and scope of marketing-research activities, and distinguish among research types (e.g., primary, secondary, quantitative, qualitative). |

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| **Outcome/ I Can** | **5.5** | **Market Planning:** Utilize principles and tools to select an audience and to identify and select marketing strategies to reach targeted audiences. |
| **Competencies** | 5.5.1 | Distinguish between marketing strategies and tactics. |
| | 5.5.2 | Explain the considerations used to develop and implement domestic and global marketing strategies. |
| | 5.5.3 | Describe the concept of market and market identification. |

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| **Outcome/ I Can** | **5.6** | **Pricing:** Apply the concepts and strategies needed to determine and adjust prices to maximize return and meet customers or clients' perception of value. |
| **Competencies** | 5.6.1 | Describe the functions of prices in markets. |
| | 5.6.9 | Compare and contrast the pricing of goods and services in business-to-business (B2B) and business-to-consumer (B2C) environments. |
| | 5.6.10 | Compare and contrast the pricing of tangible versus the pricing of intangible goods. |

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| **Outcome/ I Can** | **5.8** | **Branding:** Apply branding techniques and methods to acquire position in the minds of internal and external customers that is consistent with organizational goals and objectives. |
| **Competencies** | 5.8.1 | Describe the role and importance of customer voice in branding and how this voice may vary across media and channels. |
| | 5.8.4 | Determine company's unique selling proposition. |
| | 5.8.6 | Distinguish between product or service branding and corporate branding. |

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| **Outcome/ I Can** | **5.9** | **Marketing Communications:** Apply the concepts and determine the strategies needed to communicate information about products, services, images or ideas to achieve desired Outcome/I Cans that support organizational goals and objectives. |
| **Competencies** | 5.9.1 | Describe types of promotional channels used to communicate with targeted audiences (e.g., word-of-mouth, direct, advertising, social) and the use of public-relations activities and trade shows or expositions. |

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| **Outcome/ I Can** | **5.11** **Selling:** Determine client needs, wants and fears; and respond through planned, personalized communication that influences purchase decisions and enhances future business opportunities. |
| **Competencies** | 5.11.3 Describe the impact that digital communication is having on selling.<br>5.11.4 Identify sources of product information that can be used to communicate product benefits and ensure appropriateness of a product for the customer or client. |

# SCOPE AND SEQUENCE

## MANAGEMENT PRINCIPLES

## 141025

Students will apply management and motivation theories to plan, organize and direct staff toward goal achievement. They will learn to manage a workforce, lead change, and build relationships with employees and customers. Students will use technology to analyze the internal and external business environment, determine trends impacting business, and examine risks threatening organizational success. Ethical challenges, project management and strategic planning will also be addressed.

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| **Outcome/ I Can** | **1.1** | **Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings. |
| **Competencies** | 1.1.2 | Identify the scope of career opportunities and the requirements for education, training, certification, licensure, and experience. |

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| **Outcome/ I Can** | **1.2** | **Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration. |
| **Competencies** | 1.2.1 | Extract relevant, valid information from materials and cite sources of information. |
| | 1.2.2 | Deliver formal and informal presentations. |
| | 1.2.3 | Identify and use verbal, nonverbal, and active listening skills to communicate effectively. |
| | 1.2.4 | Use negotiation and conflict-resolution skills to reach solutions. |
| | 1.2.5 | Communicate information (e.g., directions, ideas, vision, workplace expectations for an intended audience and purpose. |
| | 1.2.6 | Use proper grammar and expression in all aspects of communication. |
| | 1.2.7 | Use problem-solving and consensus-building techniques to draw conclusions and determine next steps. |
| | 1.2.8 | Identify the strengths, weaknesses and characteristics of leadership styles that influence internal and external workplace relationships. |
| | 1.2.9 | Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity). |
| | 1.2.10 | Use interpersonal skills to provide group leadership, promote collaboration, and work in a team. |

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| **Outcome/ I Can** | **1.3** | **Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance. |
| **Competencies** | 1.3.6 | Identify the labor laws that affect employment and the consequences of noncompliance for both employee and employer (e.g., harassment, labor, employment, employment interview, testing, minor labor laws, Americans with Disabilities Act, Fair Labor Standards Acts, Equal Employment Opportunity Commission [EEOC]). |

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| **Outcome/ I Can** | **1.4** | **Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations. |
| **Competencies** | 1.4.2 | Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines). |

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| **Outcome/ I Can** | 2.1 | **Business Activities:** Relate business functions to business models, business strategies and organizational goal achievement. |
| **Competencies** | 2.1.12 | Explain the nature of management and levels of management (e.g., front line, middle management, executive). |

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| **Outcome/ I Can** | 2.4 | **Business Processes:** Relate business process design to organizational structure and organizational goal achievement. |
| **Competencies** | 2.4.1 | Explain the impact of organizational design (e.g., reporting lines) on business process design. |
| | 2.4.5 | Compare business-process thinking with results-oriented thinking, and explain how business-process thinking helps to break through a business's functional silo mentality. |
| | 2.4.7 | Describe business-process management, the role of IT and the integration of social networking into business-process performance. |
| | 2.4.8 | Explain how the need to protect assets and reduce the risk of fraud impacts the design of business processes (e.g., segregation of duties, internal controls). |

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| **Outcome/ I Can** | 3.2 | **Relationship Management:** Apply techniques and strategies to develop, maintain and grow positive relationships with employees, peers and stakeholders. |
| **Competencies** | 3.2.1 | Recognize, value and leverage personality types in business situations. |
| | 3.2.2 | Adapt management style to the personality type of others. |
| | 3.2.4 | Adapt to and lead workplace changes or situations. |
| | 3.2.5 | Manage crises in relationships. |
| | 3.2.10 | Share best practices with key individuals and groups within and outside the business. |

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| **Outcome/ I Can** | 3.3 | **Business Communications Management:** Apply strategies and procedures to plan, create, implement, and evaluate internal and external company communications. |
| **Competencies** | 3.3.2 | Explain how the content of written communications (e.g., email, text messages, chats) creates reputational, legal and regulatory exposure for organizations, and describe how to manage the risk individually and collectively. |
| | 3.3.4 | Implement strategies to solicit feedback. |
| | 3.3.6 | Communicate the business's plans, strategies and procedures, and verify the understanding of recipients. |
| | 3.3.7 | Develop, implement, monitor and adjust communications plan to meet the information needs of internal and external customers. |

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| **Outcome/ I Can** | **4.1** | **Enterprise Risk Management Fundamentals:** Apply foundational business skills and tools to identify risks and seize opportunities related to the achievement of business objectives. |
| **Competencies** | 4.1.1 | Explain the role of enterprise risk management in protecting and creating value for stakeholders (e.g., owners, employees, customers, regulators, vendors, society). |
| | 4.1.2 | Describe the impact of governmental and self-regulatory agency requirements on the structure, focus, and cost of enterprise risk management. |

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| **Outcome/ I Can** | **4.3** | **Compliance:** Develop compliance systems, processes and procedures used to manage compliance risk across an organization. |
| **Competencies** | 4.3.1 | Compare and contrast internal and external authoritative sources of compliances standards (e.g., legal code, government agencies and self-regulatory organizations), the types of institutions governed and the penalties associated with noncompliance. |
| | 4.3.2 | Explain the impact of compliance requirements on business structure, functions (e.g., marketing, information technology, human resources), products and services and pricing. |

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| **Outcome/ I Can** | **4.6** | **Corporate Social Responsibility (CSR):** Interpret, apply and communicate an organization's ethics and social responsibility policies and code of conduct in routine and ambiguous situations. |
| **Competencies** | 4.6.1 | Compare and contrast ethical standards and challenges in domestic and international markets and across countries or areas (e.g., Brazil, China, Latin America, Pacific Rim). |
| | 4.6.2 | Compare and contrast ethical challenges across industry sectors (e.g., healthcare, financial services, consumer products, manufacturing, retail) and functional areas (e.g., marketing, human resources, financial reporting). |
| | 4.6.3 | Describe social responsibility policies and practices, and explain their impact on business operations and performance (e.g. community development, charitable foundations, green practices). |
| | 4.6.4 | Identify factors that impact the social responsibility policies implemented by businesses (e.g., national and state regulations, market or customer requirements, profit considerations). |

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| **Outcome/ I Can** | **4.7** | **Governance Structures:** Relate governance structures to organizational goal achievement. |
| **Competencies** | 4.7.1 | Explain the need for and impact of governance on business management, performance and regulatory oversight. |

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| **Outcome/ I Can** | **6.1** | **Management Fundamentals:** Describe business management practices and their contributions to goal achievement and organizational success. |
| **Competencies** | 6.1.1 | Distinguish between management and leadership, and describe the factors that influence management. |

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| | 6.1.2 Describe decision-making styles (e.g., analytical, abstract or conceptual, intuitive, creative, procedural or directive), and identify the factors that influence their effectiveness.<br>6.1.3 Describe the types of resources managed in business and their significance in business operations, and explain the differences between managing internal versus external resources.<br>6.1.4 Explain the purposes and nature of management functions (e.g., strategic and tactical planning, organizing, directing, staffing, controlling), and describe considerations in the business environment that impact their use.<br>6.1.5 Compare management and motivation theories, and determine appropriate situations in which each would be used.<br>6.1.6 Explain the expectations-setting process as a motivational strategy and a management control for both upward and downward management.<br>6.1.7 Describe the nature of global management strategies.<br>6.1.9 Describe knowledge management strategies.<br>6.1.10 Describe the need for and impact of quality management in organizations.<br>6.1.11 Explain the role of supply chain management and its contributions to business operations; and identify its activities, measures and issues.<br>6.1.12 Describe project management processes, skills and knowledge necessary for successful project Outcome/I Cans.<br>6.1.13 Contrast operational risk with other types of business risk (e.g., market risk, credit risk, strategic risk).<br>6.1.14 Identify the factors that contribute to operational risk (e.g., insufficient training, lack of supervision, inadequate security, poor system design, poor HR policies).<br>6.1.15 Describe the nature of organizational development and its impact on business success. |

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| **Outcome/ I Can** | 6.2 **Information Management:** Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals. |
| **Competencies** | 6.2.3 Monitor and audit internal records.<br>6.2.7 Conduct an environmental scan to obtain information on the internal and external business environment and to identify changing conditions and current issues or trends impacting business (e.g, business intelligence, insights). |

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| **Outcome/ I Can** | 6.7 **Talent Onboarding and Development:** Apply strategies, policies and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace. |
| **Competencies** | 6.7.3 Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training). |

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| | 6.7.5 | Determine and obtain resources and tools for talent development, and ensure environment is appropriate for training. |
| | 6.7.6 | Administer talent-development activities and training, and coach for performance or development using talent-development theories. |
| | 6.7.8 | Conduct and document performance reviews to enhance performance and development and to protect the organization. |
| | 6.7.10 | Determine when employee corrective measures are needed, and take needed action to address problem or issue (e.g., retraining, reassignment, reprimand, demotion, dismissal, coaching). |

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| **Outcome/ I Can** | **6.9** | **Employee Engagement, Experience and Relations:** Identify and administer strategies, policies, activities and procedures to promote employee satisfaction, engagement and retention and to minimize costs. |
| **Competencies** | 6.9.1 | Explain the impact and cost of dissatisfied or disengaged employees, and identify the factors contributing to employee satisfaction and engagement. |
| | 6.9.2 | Recognize or reward employees for their work efforts and contributions. |
| | 6.9.3 | Coach or mentor employees on issues to improve performance. |
| | 6.9.4 | Implement processes to promote equitable opportunities for employees. |
| | 6.9.5 | Address and document employee issues, and recommend resolutions. |
| | 6.9.6 | Identify issues associated with a diverse team (e.g., generational, ethnic, gender, religious) to achieve organizational inclusion objectives. |
| | 6.9.7 | Champion and leverage workplace diversity and inclusion to achieve workplace objectives. |

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| **Outcome/ I Can** | **7.4** | **Quality Management:** Design, implement, and manage quality-control processes to minimize errors, expedite workflow, and achieve performance objectives at a reasonable cost, using continuous improvement techniques (e.g., lean, Six Sigma or DMAIC [Define, Measure, Analyze, Improve, Control]). |
| **Competencies** | 7.4.1 | Describe the nature of quality, and identify quality-control measures and techniques. |
| | 7.4.2 | Explain the components of a quality plan, its purpose for the organization, the development process, and the role of employees and data integrity in the process. |

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| **Outcome/ I Can** | **8.3** | **Project Management:** Plan, manage, monitor, and control projects to improve workflow, minimize costs, and achieve intended project Outcome/I Cans using planning and project-management tools. |
| **Competencies** | 8.3.1 | Compare and contrast the role and responsibilities of project sponsors, project managers, and project team members. |
| | 8.3.2 | Explain the impact of expectation setting on project Outcome/I Cans. |

| Outcome/ I Can | **10.1 Strategic Planning:** Implement planning tools to guide organization's or department's activities. |
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| **Competencies** | 10.1.1 Describe the strategic planning process in an organization and the relationship between strategic planning, organizational business plans, and departmental plans.<br>10.1.3 Translate the business mission into departmental imperatives.<br>10.1.4 Conduct an organizational or department situational analysis of the internal and external environment to support development of a strategic plan. |

| Outcome/ I Can | **10.3 Change Management:** Adapt to, manage, and create change initiatives in an organization to accomplish organizational objectives. |
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| **Competencies** | 10.3.1 Explain the internal and external factors that create resistance to change, and describe their impact on the speed of change.<br>10.3.2 Describe the relationship among innovation, learning, and change.<br>10.3.3 Compare and contrast strategies and approaches for leading changes involving how things are done (second-order change) versus organizational values and culture (third-order change).<br>10.3.4 Evaluate opportunities for company or departmental changes.<br>10.3.5 Identify the factors considered in establishing organizational development objectives to support change initiatives.<br>10.3.6 Analyze the factors included in a change-management initiative.<br>10.3.7 Explain the change-management life cycle and its relationship with project management.<br>10.3.8 Measure the success of change efforts. |

# SCOPE AND SEQUENCE

## OFFICE MANAGEMENT

## 142005

Students will apply techniques used to manage people and information in a business environment. Students will learn to build relationships with clients, employees, peers and stakeholders and to assist new employees. They will manage business records, gather and disseminate information, and preserve critical artifacts. They will also examine contracts, internal controls and compliance requirements. Business office tools and applications will be emphasized.

SENIOR INTERNSHIP:

Students will apply and add to the knowledge, attitudes and skills that are learned in the Office Management program in a more comprehensive and authentic way through the senior internship opportunity. Students may combine classroom learning with valuable work experience. Employability competencies will be taught and reinforced here under supervision of the school and through industry partnerships.

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| **Outcome/ I Can** | **1.1 Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings. |
| **Competencies** | 1.1.2 Identify the scope of career opportunities and the requirements for education, training, certification, licensure and experience.<br>1.1.4 Describe the role and function of professional organizations, industry associations and organized labor and use networking techniques to develop and maintain professional relationships.<br>1.1.7 Apply problem-solving and critical-thinking skills to work-related issues when making decisions and formulating solutions.<br>1.1.8 Identify the correlation between emotions, behavior and appearance and manage those to establish and maintain professionalism.<br>1.1.9 Give and receive constructive feedback to improve work habits.<br>1.1.10 Adapt personal coping skills to adjust to taxing workplace demands. |

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| **Outcome/ I Can** | **1.2 Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration. |
| **Competencies** | 1.2.3 Identify and use verbal, nonverbal, and active listening skills to communicate effectively.<br>1.2.4 Use negotiation and conflict-resolution skills to reach solutions.<br>1.2.5 Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.<br>1.2.7 Use problem-solving and consensus-building techniques to draw conclusions and determine next steps.<br>1.2.9 Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).<br>1.2.11 Write professional correspondence, documents, job applications and resumés.<br>1.2.12 Use technical writing skills to complete forms and create reports.<br>1.2.13 Identify stakeholders and solicit their opinions. |

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| **Outcome/ I Can** | **1.3 Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance. |
| **Competencies** | 1.3.3 Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).<br>1.3.8 Verify compliance with computer and intellectual property laws and regulations. |

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| **Outcome/ I Can** | **1.4 Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations. |
| **Competencies** | 1.4.1 Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems). |

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| | 1.4.2 Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).<br>1.4.3 Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.<br>1.4.4 Use system hardware to support software applications.<br>1.4.5 Use information technology tools to maintain, secure and monitor business records.<br>1.4.6 Use an electronic database to access and create business and technical information.<br>1.4.7 Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).<br>1.4.8 Use electronic media to communicate and follow network etiquette guidelines. |

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| **Outcome/ I Can** | **1.5 Global Environment:** Evaluate how beliefs, values, attitudes and behaviors influence organizational strategies and goals. |
| **Competencies** | 1.5.3 Use cultural intelligence to interact with individuals from diverse cultural settings.<br>1.5.4 Recognize barriers in cross-cultural relationships and implement behavioral adjustments. |

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| **Outcome/ I Can** | **1.8 Operations Management:** Plan, organize and monitor an organization or department to maximize contribution to organizational goals and objectives. |
| **Competencies** | 1.8.3. Analyze the performance of organizational activities and reallocate resources to achieve established goals.<br>1.8.4. Identify alternative actions to take when goals are not met (e.g., changing goals, changing strategies, efficiencies). |

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| **Outcome/ I Can** | **1.10 Sales and Marketing:** Manage pricing, place, promotion, packaging, positioning and public relations to improve quality customer service. |
| **Competencies** | 1.10.2. Determine the customer's/client's needs and identify solutions and potential community resources. |

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| **Outcome/ I Can** | **3.1 Customer Relations:** Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships. |
| **Competencies** | 3.1.1 Explain the nature of positive customer or client relations and their role in keeping customers, and describe the importance of meeting and exceeding customer expectations.<br>3.1.2 Compare the cost to acquire customers with the cost to maintain customers, and explain how these costs impact business strategy and influence which customers to maintain. |

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| | 3.1.3 Apply a customer-service mindset in a culturally appropriate manner (e.g., respond to customer inquiries; reinforce service through effective, ongoing communication).<br>3.1.4 Build rapport with customers and use this rapport to inform customers about company policies, consequences of noncompliance with recommendations or requirements and service or account terminations.<br>3.1.5 Maintain confidentiality or privacy of internal and external customers.<br>3.1.6 Reinforce company's image and culture to exhibit the business's brand promise.<br>3.1.7 Describe the scope of customer-relationship management to show its contribution to business.<br>3.1.8 Build, maintain and improve relationships with customers, or clients; and promote brand and solicit new ideas and solutions using social media.<br>3.1.9 Identify opportunities to use crowdsourcing to engage customers or clients, to improve customer or client relationships, to promote brand and to solicit new ideas and solutions.<br>3.1.10 Confer with patients about their rights and responsibilities as stated in the Patient Bill of Rights, the legal ownership of medical records, advanced directives and informed consent. |

| **Outcome/ I Can** | **3.2** **Relationship Management:** Apply techniques and strategies to develop, maintain and grow positive relationships with employees, peers and stakeholders. |
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| **Competencies** | 3.2.6 Determine the nature of office politics, and overcome problems and difficulties associated with office politics and turf wars.<br>3.2.7 Identify when and how to take risks to achieve objectives.<br>3.2.8 Describe the nature of organizational culture and its impact on business, and interpret and adapt to a business's culture.<br>3.2.9 Establish strategic relationships with others.<br>3.2.10 Share best practices with key individuals and groups within and outside the business.<br>3.2.11 Manage internal and external business relationships to foster positive interactions, and strategically plan and leverage business relationships for growth.<br>3.2.12 Describe ways that businesses build positive employer-employee relationships. |

| **Outcome/ I Can** | **3.3** **Business Communications Management:** Apply strategies and procedures to plan, create, implement, and evaluate internal and external company communications. |
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| **Competencies** | 3.3.1 Identify organizational communication hierarchies, and select the appropriate communication strategy to use for the hierarchy.<br>3.3.2 Explain how the content of written communications (e.g., email, text messages, chats) creates reputational, legal and regulatory exposure |

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| | | for organizations, and describe how to manage the risk individually and collectively. |
| | 3.3.7 | Develop, implement, monitor and adjust communications plan to meet the information needs of internal and external customers. |
| | 3.3.8 | Collaborate on and aggregate complex internal documents to create a common voice that is vision, mission and brand-consistent. |

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| **Outcome/ I Can** | **4.3** | **Compliance:** Develop compliance systems, processes and procedures used to manage compliance risk across an organization. |
| **Competencies** | 4.3.6 | Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability and Accountability Act [HIPAA]) and self-regulatory guidelines. |
| | 4.3.7 | Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements, prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up). |
| | 4.3.8 | Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation). |

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| **Outcome/ I Can** | **5.9** | **Marketing Communications:** Apply the concepts and determine the strategies needed to communicate information about products, services, images or ideas to achieve desired outcomes that support organizational goals and objectives. |
| **Competencies** | 5.9.6 | Implement word-of-mouth strategies to build brand and to promote products using word-of-mouth strategies. |

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| **Outcome/ I Can** | **6.2** | **Information Management:** Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals. |
| **Competencies** | 6.2.2 | Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data). |
| | 6.2.3 | Monitor and audit internal records. |
| | 6.2.4 | Identify critical artifacts requiring preservation, establish retention guidelines, and archive information according to retention systems and procedures and regulatory requirements. |
| | 6.2.5 | Select and use tools, systems, and processes to manage the preparation of documentation for teams and projects in a cost-effective manner (e.g., agendas, reports, minutes, training materials, RFPs [Requests for Proposal], process analysis charts and diagrams). |
| | 6.2.6 | Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information). |

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| | 6.2.10 Identify strategies for integrating technology into department or enterprise operations. |

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| **Outcome/ I Can** | **6.3** | **Business Applications:** Apply tools, processes and procedures to manage the efficient and effective use of technology to achieve organizational goals. |
| **Competencies** | 6.3.2 | Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings. |
| | 6.3.3 | Implement collaborative or groupware and cloud computing applications (e.g., services, application, virtual environments) to facilitate projects and business operations. |
| | 6.3.5 | Research and incorporate visual, interactive and social media content into business communications. |
| | 6.3.7 | Maintain a multimedia website, and test and post website design changes. |

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| **Outcome/ I Can** | **6.4** | **Knowledge Management:** Apply systems, strategies and practices to share, organize, store, analyze and facilitate the use of a business's insights, processes, procedures and experiences as a strategic asset. |
| **Competencies** | 6.4.3 | Select and implement offline tools and techniques to gather, document and organize the knowledge residing with employees across the organization (e.g., relational networks, brainstorming, learning and idea capture, peer assist, learning reviews, storytelling, collaborative physical workspace, knowledge cafés, communities of practice). |
| | 6.4.4 | Select and apply online networks and tools to disseminate knowledge and effective practices (e.g., document libraries, Wikis, blogs, social networking sites or services, knowledge clusters, expert locators, collaborative virtual workspaces, interfaces). |

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| **Outcome/ I Can** | **6.6** | **Talent Acquisition:** Apply policies, procedures, and strategies to obtain the best qualified candidates for job positions in union and non-union environments while minimizing associated costs. |
| **Competencies** | 6.6.5 | Write and post job announcements for job openings. |
| | 6.6.6 | Screen and interview job applicants using culturally appropriate techniques. |

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| **Outcome/ I Can** | **6.7** | **Talent Onboarding and Development:** Apply strategies, policies and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace. |
| **Competencies** | 6.7.2 | Conduct human resources onboarding activities (e.g., employment eligibility verification [I-9 form], tax paperwork, contracts, benefit plans, policy orientation). |
| | 6.7.3 | Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training). |

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| **Outcome/ I Can** | 6.10 | **Human Resources Operations:** Develop, implement and evaluate the day-to-day policies, procedures and activities that are used to ensure efficient, effective human-resources management. |
| **Competencies** | 6.10.2 | Process human-resource compliance paperwork, and complete required reporting (e.g., workers' compensation claims, Occupational Safety and Health Administration [OSHA] documents, employment documents, fair medical leave, disability, unemployment). |

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| **Outcome/ I Can** | 7.2 | **Sourcing and Procurement:** Implement sourcing and procurement activities to obtain resources that enable achievement of organizational goals and objectives and to enhance the organization's financial wellbeing. |
| **Competencies** | 7.2.4 | Manage the bid or contracting process (e.g., bid specification, vendor or supplier search, bid review, selection of vendor) to achieve business goals. |

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| **Outcome/ I Can** | 7.5 | **Facilities Management:** Plan, maintain, and monitor property and equipment to facilitate ongoing business activities. |
| **Competencies** | 7.5.1 | Identify routine activities for maintaining, disposing, retiring and replacing business facilities and equipment. |

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| **Outcome/ I Can** | 8.1 | **Business Process Analysis:** Conduct business process analysis to identify, analyze, and solve business problems and improve process performance. |
| **Competencies** | 8.1.2 | Document the process activities, records or information and systems involved in business activities (e.g., developing new products, acquiring new customers, producing inventory for sale, selling goods and services, managing people). |
| | 8.1.3 | Identify process requirements and performance expectations. |
| | 8.1.4 | Identify measurements and metrics for evaluating process effectiveness and efficiency. |

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| **Outcome/ I Can** | 8.3 | **Project Management:** Plan, manage, monitor, and control projects to improve workflow, minimize costs, and achieve intended project Outcome/I Cans using planning and project-management tools. |
| **Competencies** | 8.3.4 | Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources. |

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| **Outcome/ I Can** | 8.4 | **Contract Oversight:** Administer contracts to achieve organizational goals and minimize risk. |
| **Competencies** | 8.4.3 | Identify financial arrangements in contracts and the financial information required to verify compliance with the contract terms (e.g., cost plus pricing, contingent pricing, time and materials pricing, profit-sharing, percentage-based fees). |

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| | 8.4.4 | Identify contract terms that might restrict future business activity (e.g., required credit rating, maximum debt-to-equity ratio, minimum cash reserve, prohibited lease transactions, shared information). |
| | 8.4.5 | Identify contract terms that mandate reporting of financial and non-financial information, and establish processes to collect and submit required information. |
| | 8.4.6 | Develop process to monitor contract terms for compliance and to protect against breach of contract or default. |
| | 8.4.7 | Determine strategies to manage compliance of outsourced and hosted service providers. |
| | 8.4.11 | Maintain contract compliance documentation for required timeframe. |

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| **Outcome/ I Can** | **9.4** | **Internal Controls:** Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards. |
| **Competencies** | 9.4.1 | Describe the impact of financial reporting and internal control regulations on control requirements (e.g., Sarbanes-Oxley Act of 2002, Dodd-Frank Wall Street Reform Act, Model Audit Rule, Government Accountability Standards). |
| | 9.4.4 | Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls). |
| | 9.4.5 | Inspect and ensure the continued functioning of internal controls. |
| **Outcome/ I Can** | **9.5** | **Financial Accounting:** Track, record, and summarize financial transactions to enable accurate reporting of financial activity to external parties. |
| **Competencies** | 9.5.11 | Perform procedures to validate accuracy of accounting data, to identify errors and to make corrections (e.g., review trial balance, reconcile cash, proof ledgers, count inventory). |
| | 9.5.14 | Identify and preserve accounting information in compliance with regulations and policies. |

## SENIOR INTERNSHIP

Students will apply and add to the knowledge, attitudes and skills that are learned in the Office Management program in a more comprehensive and authentic way through the senior internship opportunity. Students may combine classroom learning with valuable work experience. Employability competencies will be taught and reinforced here under supervision of the school and through industry partnerships.

## STUDENT ASSESSMENT POLICY
## BUSINESS MANAGEMENT
## WEST SHORE CAREER AND TECHNICAL DISTRICT

The student shall perform competencies and key indicators in a manner acceptable to the business community. The standards set for these competencies are recommended by the advisory committee members and local employers in the community and evaluated by the teacher following these guidelines. In order to receive credit for the course, competencies to be mastered must be determined by the teacher as suggested by the advisory team.

In order to measure the progress of each student in the program and to measure the effectiveness of the total program, the following procedures will be used:

- Pretests
- Post Tests
- Teacher observation and evaluation
- Notebooks
- Portfolio
- Class discussions
- Skill testing
- Project development
- Daily grades
- Lab performance
- Career technical rules and regulations for early placement
- Industry certifications
- Work-based Learning or internships

Measurement of learning will be an ongoing activity with emphasis on laboratory activities and competency improvement. Evaluation will be accomplished through pre-assessment of students' skills, frequent formative assessment, both visual and written, and summative evaluation to determine the mastery of competencies. Formative assessments that are conducted during instruction help the teacher make necessary instructional adjustments. The instructor may decide to alter instructional materials and methods if students are experiencing difficulties in learning what is being taught. All evaluations are in the form of points received out of points possible. A percentage is then calculated and a letter grade is assigned. Each semester, a midterm exam is given, which is worth 10 percent of the final grade. Grades for all students are found online and are continuously updated.

## LAKEWOOD CITY SCHOOL DISTRICT'S GRADING SCALE

97-100% = A+
93- 96% = A
90- 92% = A-
87- 89% = B+
83- 86% = B
80- 82% = B-
77- 79% = C+
73-76% = C
70-72% = C-
67-69% = D+
63-66% = D
60-62% = D-
59% or less=F

The Medical Office Management program will take the Ohio Career Technical Competency Assessments, which is a web-based exit exam, to attest to their abilities in Medical Office Management as they enter the workforce.