Mississippi Department of Education
Office of Curriculum and Instruction

Course Title: **Management Essentials**

Grade Level: **9, 10, 11, 12**

Carnegie Unit: **1**

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Management Essentials

Unit 1: Business Operations and Security

Competency 1: Explain the functions of business operations.

Suggested Enduring Understandings	Suggested Essential Questions
1. There are several types of business operations necessary in order for a business to function properly. 2. Ethical guidelines are in place for safety on the Internet. 3. Technology is an important part of business operations.	1. What are the common types of business? 2. What types of operations software are used by your school or school district? 3. What are ways in which you use technology to do business?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Discuss the types of business operations to include facilities management, logistics, scheduling, and safety.	a. Discuss common types of operations software to include project management, budgeting, scheduling, inventory, computer security, document management, and manufacturing automation. Have students use the Internet to research specific software packages of each type and then use spreadsheet software to prepare a purchase requisition that includes the software name, type, features, cost, and vendor name and contact information. Have students select an item they would like to purchase and locate an online business that sells the item. Have them use the site to simulate the selection and purchase of the chosen item and then discuss the site's features including ease of use, product selection, price, and design. Have them determine whether principles of price, product, place, and promotion were used and provide examples from the site in written report form.	a. Evaluate research for content and appearance. Assess student understanding by observing contributions to class discussions and participation in activities. Use the Written Report Assessment Rubric to evaluate student reports for accuracy and content.
b. Discuss the role of ethics in operations.	b. Discuss ethical issues related to spamming, business e-mail, and the use of the Internet. Have students use the Internet to search for current articles and/or case studies related to business ethics. Have them prepare and present a report and an electronic slide presentation of their	b. Assess students' knowledge through a summative assessment using a classroom response system and/or Blackboard. Evaluate research for content and appearance.

findings.

c. Describe the use of technology in operations.	c. Compare and contrast the types of computers including desktop, laptop, and personal digital assistant (PDA).	c. Assess students' knowledge through a summative assessment using a classroom response system and/or Blackboard.
	Label the main hardware components of a computer including the CPU, CD-ROM/DVD drive, keyboard, mouse, monitor, printer, scanner, and modem.	Check for student understanding by using a teacher-created checklist.
	Have students use a digital camera or scanner to create digital pictures in gif or jpeg format and then insert the picture into a document using a graphics arts or Web page design program.	
	Review Internet terminology including Web server, filename extensions (.com, .edu, .gov), business-to-business (B2B) and business-to-consumer (B2C), uniform resource locator (URL) browser, and search engine. Assign one term to each student, and have each student print an example to show use of the technology.	Check for accuracy by observation.
		Assess student understanding by observation.

Competency 2: Discuss health and safety regulations in the workplace and procedures for reporting noncompliance.

Suggested Enduring Understandings	Suggested Essential Questions
1. Safety procedures are put in place to protect both people and equipment.	1. What are some worker's rights in regard to workplace safety?
2. Computer equipment can potentially pose health hazards.	2. What are the potential health hazards when working with computer equipment?
3. Laws are in place for workplace safety.	3. What are some safety rules that are implemented at your school?
4. There are laws in place for noncompliance to safety guidelines.	4. What are some consequences to federal guidelines?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Identify health concerns.	a. Have students work in teams and use the Internet to locate information related to health and safety in the workplace. Have each team locate the following: ○ The roles and responsibilities of the Health and Safety Authority in a specific state ○ Workers' rights and responsibilities in regard to health and safety in the workplace ○ Ways to avoid workplace. Have students use the Internet to identify health	a. Assess student understanding by observing contributions to class discussions and participation in activities.

	concerns (carpal tunnel syndrome, eye strain, falls, spills, burns, muscle strain, and unsafe equipment operation) in the workplace and then create a brochure that discusses health concerns, the cause, and solutions to the problem.	Assess student understanding by checking brochures for accuracy.
b. Review safety procedures for a given career field.	b. Have students use the Internet to locate information related to a given career field and review safety procedures for that field. Have them present their findings using an electronic slide presentation and explain why those procedures are needed and how the laws presented in Unit 5 apply to safety in that career field.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
	Have students demonstrate safety precautions used when using equipment such as a photocopier, scissors, a stapler, a hot glue gun, and extension cords in the workplace.	Evaluate student understanding by using the Role-play or Skit Assessment Rubric.
	Invite a local business representative to discuss procedures for emergency situations in the workplace.	
	Invite a human resource specialist to discuss his or her safety training plan. Have students take notes.	
		Assess student understanding by reviewing the students' Guest Speaker Evaluation Forms.
	Have students work in teams to create a safe work environment portfolio/policy/procedures manual for a local business to include safety rules, potential safety hazards, and solutions or preventions.	Evaluate student understanding by using the Group Work Assessment Rubric.
c. Investigate federal safety regulations and procedures for reporting noncompliance.	c. Have students tour the career–technical center to discover various health and safety regulations related to each occupational area. Have them work in teams to create a booklet for each program's health and safety rules and procedures.	c. Evaluate research for content and appearance.

Competency 3: Discuss purchasing activities to obtain business supplies, equipment, and services

Suggested Enduring Understandings

1. Following proper purchasing procedures assists in maintaining inventory.
2. Every time you make a purchase, steps in the purchasing procedure must be followed.
3. Everyone plays a role in the purchase and expense process.

Suggested Essential Questions

1. What process should be following in replenishing inventory?
2. What decisions must to made in the purchasing process?
3. What is the employee role in expense control?

Suggested Performance	Suggested Teaching Strategies	Suggested Assessment

Indicators		Strategies
a. Explain purchasing procedures.	a. Discuss how businesses make their buying decisions to include the following decisions: What to purchase, when to purchase, from whom to purchase, and how to purchase. Use Access to set up inventory of supplies and implement a system to know when to replenish. Create another database for inventory.	a. Evaluate research for content and appearance
b. Discuss procedures for maintaining an inventory of supplies.	b. Discuss the business buying process to include the following steps: Problem recognition, product specification, supplier search, supplier selection, submit order, and review performance. Using Excel, have students develop a purchase plan for a list of proposed products for a business of the students' choice. Students will determine the price that will be charged for each listed product. They will then estimate monthly operating expenses for the business. Students will determine if the business has made a profit or a loss. Have students use the Internet to research online articles related to inventory systems. Have students write and prepare a summary on an article's information using word processing software and present the information to the class. Have students work in groups to participate in a role-play situation dealing with inventory in business situations.	b. Assess student understanding by observing contributions to class discussions and participation in activities. Assess students' knowledge through a summative assessment using a classroom response system and/or Blackboard. Use the Presentation Assessment Rubric to evaluate student understanding. Use the Group Work Assessment Rubric.
c. Discuss production.	c. Define the term "production," the process of creating, expanding, manufacturing, or improving on goods and services. Have students complete student-guided notes (fill-in-the-blank notes that students use as the teacher lectures) on the following inventory terms: Inventory, inventory management, just-in-time (JIT) inventory system, perpetual inventory system, physical inventory system, cycle counts, stock-keeping unit (SKU), dollar control, unit control, inventory turnover, basic stock list, model stock list, never-out list, real-time inventory system, and ASAP (as soon as possible).	c. Assess student understanding by observing contributions to class discussions and participation in activities. Check student-guided notes for accuracy.

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
d. Describe production activities.	d. Students will classify production activities including growing, extracting, and manufacturing.	d. Assess students' knowledge through a summative assessment using a classroom response system and/or Blackboard.

Competency 4: Implement quality-control processes to minimize errors and to expedite work flow.

Suggested Enduring Understandings	Suggested Essential Questions
1. Quality-control measures are in place to limit errors and ensure smooth workflow. 2. Quality control is utilized both at work and at home.	1. What is the difference between a good leader and someone who is simply supervising employees? 2. What is the role of good supervision in the quality-control process?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Identify quality-control measures.	a. Invite a guest speaker in management to speak to students on the importance of quality in the workplace. The teacher and students will be involved in a class discussion about the role of management in a horizontal organization and a vertical organization. Discuss the pros and cons of both systems.	a. Check for student understanding by reviewing the students' Guest Speaker Evaluation form. Assess student understanding by observing contributions to class discussions and participation in activities.
b. Utilize quality-control methods at work.	b. Students will construct a box from paper materials to be used to package an egg. Once the container is constructed, the egg will need to be packaged in wrapping materials to protect the egg. The students may conduct a drop test to determine if the egg will survive a drop from the roof of a building. Students will apply the importance of quality control as they check to see if the egg survived the drop due to the packaging that is used in the product packaging.	b. Evaluate research for content and appearance.
c. Describe the role of management in the achievement of quality.	c. The students or teacher will use role-play to demonstrate characteristics of an effective supervisor. All characteristics should be included in the demonstration including giving clear directions, training new employees, being consistent, treating employees fairly, being firm when necessary, setting a good example, delegating responsibility, and fostering teamwork. Discuss and differentiate between a good leader and someone who is simply supervising employees.	c. Assess student understanding by observing contributions to class discussions and participation in activities.
d. Establish efficient operating systems.	d. Students will role-play business situations using the horizontal organization and the vertical	d. Assess student understanding by

		observing contributions to class discussions and participation in activities.

Competency 5: Implement expense-control strategies to enhance a business's financial well-being.

Suggested Enduring Understandings

1. Items stole from businesses increase price and operating cost.
2. Employees play an important role in expense control.

Suggested Essential Questions

1. What is the nature of overhead/operating cost?
2. What is the employee's role in expense control?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Explain the nature of overhead/operating costs.	a. Students will give examples of items that get taken from places of business each day. Each student will then discuss the cost of each item and how that cost affects a business.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
b. Explain the employee's role in expense control.	b. Students will research and create an electronic slide presentation on costs related to starting, managing, and operating a business. Students will discuss what they feel is their role in expense control.	b. Evaluate research for content and appearance. Assess student understanding by observing contributions to class discussions and participation in activities.

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Unit 2: Information Management

Competency 1: Apply filing procedures		

Suggested Enduring Understandings

1. Information management is used by everyone daily.
2. An electronic filing system is necessary for easy retrieval of information.
3. Electronic storage media assist in keeping large amounts of data in limited space.
4. Knowing how long to keep records is essential to good information management.

Suggested Essential Questions

1. What are ways information management is used in daily activities?
2. What are the benefits of having a good filing system?
3. What are the pros and cons of using electronic storage opposed to manual storage systems?
4. Why is it important to know how long to keep records?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Use the Internet to research federal laws related to confidentiality of records, and present findings.	a. Discuss learning goals for the unit. As each concept is taught, present assessment criteria for each assignment to ensure that students understand standards and expectations.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
	The Graffiti Wall technique provides an opportunity for students to decorate a wall or space with graphics/pictures that represent what they understand about a topic. At the beginning of the unit, use a Graffiti Wall to determine what the students know about filing management. At the end of the unit, have students add what they have learned to the wall.	Check the Graffiti Wall for accuracy.
	Using a cell phone or PDA, display the contacts as an introduction to a discussion of how information management is used by students every day.	Use observation to evaluate understanding.
	Have students research the Internet for federal laws related to confidentiality of records and discuss these with the class.	Evaluate Web-based research, and have students peer assess research using the Web Page Evaluation Checklist.
	Have students use the Internet to research the history of the Privacy Act of 1974 and the impact on business operations. Have students complete a one-page report on the act and its impact on business.	Using the written report assessment rubric, evaluate student work.

b. Discuss the importance of ethical conduct when working with sensitive information.	b. Lead the class in a discussion of the importance of ethical conduct when working with sensitive information. Have students work in groups to write scenarios demonstrating ethical and unethical conduct when working in the workplace. Discuss with students the responsibilities of business owners concerning records maintenance according to federal law. Have students use the Internet to research and debate whether employees have privacy rights in a workplace.	b. Evaluate scenarios for understanding of ethical and unethical conduct by observing student demonstrations. Evaluate student understanding by observation. Use the Debate Assessment Rubric to evaluate student activity.
c. Identify filing systems.	c. Describe the various types of records storage equipment. Have students take notes. Have students define terms related to information management including record clerks, surname, storage media, fields, record, file, database, requisition card, out guide, out folder, indexing, guides, retrieve, store, tickler file, alphabetically, chronologically, manually, sort, and code.	c. Assess student understanding by observing contributions to class discussions and participation in activities.
d. Discuss classification, retention of records, and storage methods for useful, important, and vital records.	d. Describe and demonstrate how to transfer and store inactive files. Have students use the Internet to research the various media used in filing and prepare a summary using word processing software.	d. Assess student understanding by observing contributions to class discussions and participation in activities.
e. File records according to basic indexing rules for personal and business names manually and electronically.	e. Discuss and demonstrate the basic indexing rules for personal and business names. Have students practice using basic indexing rules for personal and business names. Have students perform manual filing activities for personal and business names. Have students peer assess the activities. Have students perform filing activities electronically using a database.	e. Assess student understanding by observing contributions to class discussions and participation in activities. Evaluate filing activities for correct application of basic indexing rules.
f. Discuss electronic filing and storage media used for filing systems. (DOK3)	f. Have students create an electronic database using Microsoft Access.	f. Assess student understanding by observing contributions to class discussions and participation in

		activities.
	Discuss the different types of electronic storage media such as CDs, floppy disk, hard drive, and servers.	Observe students to evaluate understanding.

References

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   faculty.spokanefalls.edu/InetShare/AutoWebs/loud/ARMA%20Filing%20Rules.ppt

ARMA International. (2005). *Establishing alphabetic, numeric, and subject filing systems.* Retrieved
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   OH: Thomson.

Kaliski, B. S., Passalacqua, D., & Schultheis, R. A. (2006). *Keeping financial records for business* (4th ed.).
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For additional references, activities, and Web resources, please refer to the Business and Management
   P.A.C.E. Web site at http://rcu.blackboard.com (available only to registered users).

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Unit 3: Management Applications

Competency 1: Investigate the role of American business in a global society.

Suggested Enduring Understandings	Suggested Essential Questions
1. American business is a part of the global society. 2. Entrepreneurs are the backbone of the economy.	1. What part does the United States play in the global society? 2. What does an entrepreneur do?

Suggested Performance Indicators	Suggested Teaching Strategies		Suggested Assessment Strategies
a. Determine the role of entrepreneurship in today's multicultural, global society.	a.	At the beginning of the unit, pre-assess student knowledge of entrepreneurship by using the Closing Circle technique. Have students take turns sharing one thing they know about entrepreneurship. At the end of the unit, assess student knowledge by having them respond to four questions related to the unit. Have them write a response to each question on a 4-in. by 6-in. index card.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
b. Analyze and discuss entrepreneurial opportunities in future trends.	b.	Have students use the Internet to research information about Tom Anderson and how he started the MySpace Web site (http://en.wikipedia.org/wiki/Tom_Anderson_(My Space); http://en.wikipedia.org/wiki/MySpace; http://www.forbes.com/2006/01/04/myspace-dewolfe-anderson-cx_np_0104myspace.html; http://www.spiegel.de/international/spiegel/0,1518,459685,00.html). Use the information to generate a class discussion on entrepreneurship. Have students complete the self-assessment at http://www.entrepreneur.com/startingabusiness/selfassessment/article84134-1.html and then discuss their entrepreneurial personality types. Lead a class discussion of the article "7 Habits for Business Success" available at http://www.entrepreneur.com/startingabusiness/selfassessment/article70826.html. Use a data projector to present the slide show available at http://inc.com/multimedia/slideshows/content/inc-5000-how-we-did-it.html. Lead a class discussion of the traits of successful entrepreneurs. Have students make a list of qualities of successful entrepreneurs and then discuss ways their personal skills and traits might be used to start	b. Evaluate the Venn diagram for accuracy and completeness.

	Suggested Performance Indicators		Suggested Teaching Strategies		Suggested Assessment Strategies
			their own business.		
c.	Outline the channels of distribution.	c.	Define channels of distribution to include direct distribution, indirect distribution, wholesaler, retailer, and consumer. Define distribution to include the responsibility for moving, storing, locating, and/or transferring ownership of goods and services.	c.	Assess student understanding by observing contributions to class discussions and participation in activities.
d.	Analyze the various types of businesses in the channels of distribution.	d.	Discuss the three ways of distribution to include transport products, receive products, and store products. $^{(E1,E3,E5, R3,R5,R6, W1,W2,W3,W4,W5 CS2,CS4,CS5, EC2)}$ Discuss time utility and place utility and how they relate to customer satisfaction in the distribution process.	d.	Assess student understanding by observing contributions to class discussions and participation in activities.
e.	Discuss the emergence of the United States' global business connections and the impact on U.S. business development and production.	e.	Have students use the Internet to research the companies presented at http://finance.yahoo.com/career-work/article/103776/America's-Best-Young-Entrepreneurs-2007#table and then create and present a podcast about an assigned entrepreneur.	e.	Assess student understanding by observing contributions to class discussions and participation in activities.

Competency 2: Explore the various business ventures, and justify the selection.

Suggested Enduring Understandings	**Suggested Essential Questions**
1. Establishing a business has many steps and processes. 2. Examine the differences in franchises, global business, and starting a new business.	1. What is the difference in establishing a new business and buying a franchise? 2. What is a franchise?

	Suggested Performance Indicators		Suggested Teaching Strategies		Suggested Assessment Strategies
a.	Investigate the advantages/disadvantages of buying an established business and starting a business.	a.	Download the Lemonade Tycoon game available at http://www.download-free-games.com/simulation/lemonade_tycoon.htm, and have students play it as an introduction to the unit. Use activities from the game to start a discussion about what it would be like to own a business.	a.	Assess student understanding by observing contributions to class discussions and participation in activities.
b.	Evaluate various business opportunities.	b.	Have a local business owner speak to the class about starting and owning a non-franchise business	b.	Evaluate scenarios to determine whether students understand the responsibilities of business ownership.
c.	Investigate the challenges of entering a family business.	c.	Have students research the responsibilities of starting a business at http://www.toolkit.com/small_business_guide/sbg.aspx?nid=P01_0000 and develop a scenario for starting a new business. Students will present these scenarios to the class for discussion.	c.	Assess student understanding by observing contributions to class discussions and participation in activities.
d.	Determine benefits	d.	Use the Web site	d.	Evaluate student

and drawbacks of buying an established business as opposed to starting a new business.	http://www.toolkit.com/small_business_guide/sbg.aspx?nid=P01_0900 to discuss advantages/disadvantages of buying a franchise.	contributions to the debate.
e. Discuss the responsibilities of starting a business for one's self.	e. Have students generate ideas for a business venture using information available at http://www.sba.gov/teens/ideas.html.	e. Assess student understanding by observing contributions to class discussions and participation in activities.
f. Discuss the importance of the global marketplace, and determine where there are opportunities.	f. Assign students to groups, and have them play the Industry Player Business Simulation game found at http://www.industryplayer.com/download.php.	f. Observe as students participate in the simulation game.
g. Determine key factors to consider when doing business with another country.	g. Have students complete lessons related to the global marketplace available at http://www.globalenvision.org/forteachers/29/1227/.	g. Evaluate global marketplace activities for accuracy and completeness.

Competency 3: Conduct marketing research.

Suggested Enduring Understandings	Suggested Essential Questions
1. It is important to know the market with which you are conducting business. 2. Some products are directly geared toward an age group or personality type.	1. What are some of the characteristics of the consumer with whom I will be doing business with? 2. What kind of advertising should I do?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Discuss the types of marketing research.	a. Demonstrate the difference in a consumer and a producer by having students complete the consumer/producer activity online at http://www.econedlink.org/lessons/index.cfm?lesson=EM464. Have students discuss their favorite products and the producers of these products.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
b. Outline the steps in the research process.	b. Present information related to marketing research available at http://marketingteacher.com/Lessons/lesson_marketing_research.htm. Lead a class discussion of the steps involved in marketing research. Discuss marketing research methods and how various products are researched using these methods.	b. Assess student understanding by observing contributions to class discussions and participation in activities.
c. Analyze strengths and weaknesses of competitors.	c. Direct students to http://www.smetoolkit.org/smetoolkit/en/content/en/531/Effective-Competitive-Analysis, and discuss the steps involved in competitive analysis. Lead a class activity in which students select a local business and then use competitive analysis	c. Assess student understanding by observing contributions to class discussions and participation in

	to evaluate the strengths and weakness of its competitors. (For example, the class might choose to analyze Walgreens vs. CVS Pharmacy or Kroger vs. Bruno's.)	activities.
d. Complete a customer profile.	d. Have students complete a customer profile worksheet available at http://www133.americanexpress.com/osbn/Tool/biz_plan/market/customers.pdf. Discuss why this information is important in marketing a product.	d. Assess student understanding by observing contributions to class discussions and participation in activities.
e. Complete a customer needs analysis.	e. Demonstrate how to develop an online survey, and then have students work in teams to develop an online survey at http://info.zoomerang.com/. Surveys should include questions related to where survey takers like to shop, where they like to eat, and what they watch on TV. Have the class brainstorm additional questions to be included in the surveys. Have teams exchange their survey links and complete the surveys developed by other teams.	e. Evaluate the customer profile worksheet for accuracy and completeness.

Competency 4: Produce a business plan.		

Suggested Enduring Understandings
1. The entrepreneur should make detailed preparations before entering business.

Suggested Essential Questions
1. What steps should be considered before starting a business?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Explain the purpose of a business plan.	a. Lead a class discussion of the purpose of a business plan using information available at http://www.nolo.com/article.cfm/ObjectID/5705AF4D-2466-4B5B-BCCF04B021C01516/catID/E67C08E9-9FAE-4AD8-840371947878E573/111/228/289/ART/.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
b. Analyze the parts of a business plan.	b. Discuss the parts of a business plan using information available at http://www.nolo.com/article.cfm/ObjectID/8AE4F799-0038-4471-B573659C196695D2/catID/E67C08E9-9FAE-4AD8-840371947878E573/111/228/289/ART/.	b. Assess student understanding by observing contributions to class discussions and participation in activities.
c. Prepare a business plan using word processing software.	c. Have students develop a business plan by completing the activities available at http://www.suite101.com/lesson.cfm/18659/1973.	c. Assess student understanding by observing contributions to class discussions and participation in activities.
d. Present the business plan using formal	d. Present the parts of a business plan using information from	d. Evaluate the business plan for accuracy and

presentation techniques and electronic presentation software.	http://www.sba.gov/teens/myplan.html, and present the sample plan available at http://archive.sba.gov/teens/sample_business_plan.html.	completeness.

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<tr><td colspan="3" style="background:#6a6fc0;color:white">Competency 5: Investigate procedures for establishing a business</td></tr>
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Suggested Enduring Understandings	**Suggested Essential Questions**
1. There are legal aspects to be considered before beginning a business.	1. What legal documents do I need to be aware of before beginning a business?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Investigate registration of the business name and licensing procedures.	a. Use information available at http://www.myownbusiness.org/business_permits_license/#1 to lead a discussion of registration and licensing procedures.	a. Assess student understanding by observing contributions to class discussions and participation in activities.
b. Research the process for becoming a registered employer with the state and federal government.	b. Have students investigate small business financing options using the Small Business Guide to Government Grants and Loans available at http://www.business.gov/financing/ and l and A Guide to Business Credit for Women, Minorities, and Small Businesses available at http://www.federalreserve.gov/pubs/buscredit/default3.htm. Lead a class discussion of their findings.	b. Assess student understanding by observing contributions to class discussions and participation in activities.
c. Investigate state and federal tax reporting procedures.	c. Have students complete filing procedures for a small business using activities available at http://www.irs.gov/newsroom/article/0,,id=98248,00.html.	c. Evaluate the brochure using the MS SBA Registration and Licensing Procedures Checklist.
d. Investigate options for financing a small business.	d. As an introduction to the lesson, have students play the Stock Market Simulation game available at http://www.mississippisms.com/. Use the game as a starting point for a discussion of ways to finance a business.	d. Assess student understanding by observing contributions to class discussions and participation in activities.

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Suggested Enduring Understandings	**Suggested Essential Questions**
1. An organizational chart aids in the creation of supervisors and responsibilities.	1. Who will be the supervisor and the person responsible for various positions in the business?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Develop an organizational chart.	a. Ask students the following: "If you work, who is the boss? Who is next in charge? Who comes after that? If you don't work, who is the boss in your	a. Assess student understanding by observing

	home? Who is next in charge? Who comes after that?" As a visual aid to the discussion, use word processing software and a data projector to draw and display a simple organizational chart.	contributions to class discussions and participation in activities.
b. Develop job descriptions for each position on the chart.	b. Discuss job descriptions. Explain their purpose, and describe the components of a well-written description. Show students an example of a basic job description available at the U. S. Department of Labor Web site: http://guidetojobdescriptions.com/data/BasicJDFormat.htm. Present an overview of the components of a job description at http://www.sba.gov/smallbusinessplanner/manage/manageemployees/SERV_JOBDESC.html, and review the components of job descriptions. Have students write a job description.	b. Evaluate job descriptions for punctuation, spelling, grammar, completeness, and accuracy.
c. Investigate planning, organizing, staffing, and controlling.	c. Have students use the Internet to research the organization of a business, and then have them create an organizational chart for that business. Have them develop job descriptions for each position on the chart.	c. Evaluate organizational charts for accuracy and completeness.
d. Explain the meaning of legal and social responsibility.	d. Discuss the legal responsibilities of a position of authority.	d. Evaluate student understanding by classroom participation.

Competency 7: Demonstrate business use of financial statements.

Suggested Enduring Understandings	Suggested Essential Questions
1. Petty cash is used in businesses. 2. Balances sheets and income statements are used in a business. 3. Purchase orders and invoices are used businesses when purchasing goods or service.	1. How is petty cash used in businesses? 2. Why are balance sheets and income statements used in businesses? 3. Why are purchase orders and invoices used in business operations?

Suggested Performance Indicators	Suggested Teaching Strategies	Suggested Assessment Strategies
a. Demonstrate the use of petty cash in a business. (DOK2)	a. Give one student play money, and tell the student that he or she is responsible for it. Have the other students ask that student to give them money for various reasons. After students have taken all the money, ask the one who was responsible for the money to account for it. Use this activity to lead a discussion of the importance of keeping financial records. Discuss and demonstrate the use of a petty cash fund in a business. Have students work in teams to role-play using a petty cash fund. Allow each student to serve as the one responsible for the fund. Have students	a. Evaluate petty cash fund records for completeness and accuracy.

	critique each other on how well they have kept the records.	
b. Demonstrate the use of balance sheets and income statements in a business.	b. Use a T-chart to determine what students know about financial statements. Draw a simple T, and have students write what they know about financial statements on the left side of the T. At the end of the lesson, use a T-chart to determine what students have learned. Have students write down what they have learned on the right side of the T. Have students define terms related to financial statements including balance sheet, income statement, assets, liabilities, capital, revenue, expenses, profit or loss, gross profit, net profit, cash flow, cost of goods sold, accounting equation, merchandise inventory, accounts receivable, and accounts payable. Discuss the value of balance sheets and income statements to a business, and then demonstrate how to prepare balance sheets and income statements for a business. Have students prepare balance sheets and income statements. Have students interview a business owner/manager or use the Internet to research the ways the information on balance sheets and income statements is used in a business. Have students prepare a summary of their findings using word processing software. Students will discuss their findings with the class. This assignment should be designed to meet the certification standards for the Microsoft Office Specialist exam (http://www.microsoft.com/learning/mcp/officesp ecialist/objectives/Word2003ExamSkillStandards.m spx).	b. Evaluate T-charts to assess student knowledge of concepts related to financial statements. Evaluate balance sheets and income statements for completeness and accuracy. Use the Interview Assessment Rubric to assess students' work.
c. Demonstrate the use of purchase orders and invoices in a business.	c. Discuss and demonstrate the use of purchase orders and invoices in a business. Have students prepare purchase orders and invoices using word processing software. Have students peer assess the prepared purchase orders and invoices and make edits.	c. Evaluate purchase orders and invoices for completeness and accuracy.

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For additional references, activities, and Web resources, please refer to the Business and Management P.A.C.E. Web site at http://rcu.blackboard.com (available only to registered users).

Appendix A: Suggested Rubrics and Checklist

Business Letter Assessment Rubric

NAME: DATE: PERIOD:

	Excellent 4 Points	Proficient 3 Points	Needs Improvement 2 points	Unsatisfactory 1 Point	Score
Layout/Design	Creatively designed, easily read, excellent business letter	Attractive, easy to read, good business letter	Appears busy or boring, difficult to read, needs improvement	Unattractive or inappropriate, very difficult to read, not acceptable	
Information, Style, Audience, and Tone	Accurate and complete information, very well written and presented	Well written and interesting to read	Some information provided but is limited or inaccurate	Poorly written, inaccurate, or incomplete	
Accurate Parts	Complete with all required parts	Some elements may be missing.	Most elements are missing or out of place.	Proper form for a letter not used	
Grammar, Punctuation, and Wording	Excellent presentation, style, grammar, and punctuation	Fair presentation, style, grammar, and punctuation	Missing information, inaccurate punctuation and/or grammar	Poor grammar, punctuation, and wording	
Following Directions and Guidelines	Always on task, always followed directions	Followed directions with some guidance	Required a good bit of extra guidance	Did not follow directions and did not ask for extra help	
				TOTAL	

Comments:

Business Plan Worksheet

NAME: _____ DATE: _____ PERIOD: _____

Refer to the article "Five Crucial Components of a Business Plan" available at http://ezinearticles.com/?Five-Crucial-Components-of-a-Business-Plan&id=12178 for a description of each of the components of a business plan listed below. Include each of the sections listed below in a simple business plan for your selected business venture. Prepare the business plan using word processing software.

I. Executive Summary Section

II. The Business Section

III. Market Analysis Section

IV. Financing Section

V. Management Section

Career Multimedia Presentation Assessment Rubric

NAME: _____   DATE: _____   PERIOD: _____

	Exemplary 4 points	Accomplished 3 points	Developing 2 points	Beginning 1 point	Score
Content	Included all components: Research on three careers, job titles, educational requirements, skill requirements, expected job growth, and entry-level salaries	Included four to five components	Included two to three components	Included one component	
Clarity	Logical, orderly sequence	Logical sequence	Unclear sequence	No sequence	
Presentation	Clear voice and correct pronunciation of all words	Clear voice and pronounced no more than one word incorrectly	Low voice and pronounced two to three words incorrectly	Mumbling and pronounced more than three words incorrectly	
Design	Used appropriate design principles; no typos; grammatically correct	Presentation contained one design error and/or one grammatical error.	Presentation contained two to three design and/or grammatical errors.	Presentation contained more than three design and/or grammatical errors.	
Length	Included 10 slides and lasted 10 minutes	Included seven to nine slides and lasted 7 to 9 minutes	Included five to six slides and lasted 5 to 6 minutes	Included less than five slides and lasted less than 5 minutes	
Eye Contact	Maintained eye contact with audience members at various locations in the room	Maintained eye contact most of time; looked only at one section of the audience	Read from notes; occasionally glanced at the audience	Made no eye contact because information was being read from notes	

Comments:

CTESO Presentation Assessment Rubric

NAME: **DATE:**   **PERIOD:**

	Exemplary 4 points	Accomplished 3 points	Developing 2 points	Beginning 1 point	Score
Content	Included all components: motto, creed, emblem, colors, theme, and history; included famous or successful CTESO members	Included four to five components	Included two to three components	Included one component	
Clarity	Logical, orderly sequence	Logical sequence	Unclear sequence	No sequence	
Design	Used appropriate design principles; included appropriate graphics or illustrations; no typos; grammatically correct	Presentation contained one design error and/or one grammatical error. Included appropriate graphics or illustrations	Presentation contained two to three design and/or grammatical errors. Included non-related graphics or illustrations	Presentation contained more than three design and/or grammatical errors. No graphics or illustrations included	

Case Study Assessment Rubric

NAME: _____ DATE: _____ PERIOD: _____

	Excellent 4 Points	Accomplished 3 Points	Needs Improvement 2 Points	Unsatisfactory 1 Point	Score
Comprehension	Shows complete understanding of the issues and grasps implications beyond the immediate issue	Asks for more details to clarify understanding of the issue	Shows partial understanding of the issue but does not ask for clarification	Resists attempts to get clarification	
Strategizing	Develops realistic strategies that provide a satisfactory conclusion	Chooses appropriate strategies that may satisfy	Shows evidence of strategy that may or may not satisfy	Needs assistance to choose a strategy	
Innovation	Devises more than one resolution to the problem	Offers a solution	Offers a solution with a limited point of view	Shows some understanding of the problem	
Communication	Convincingly communicates resolution	Explains solution so others can understand	Conveys an opinion	Unsure of how to explain	
				TOTAL	

Comments:

Electronic Slide Presentation Rubric

NAME: _____ DATE: _____ PERIOD: _____

	Exemplary 4 points	Accomplished 3 points	Developing 2 points	Beginning 1 point	Score
Content	Clear, appropriate, and correct	Mostly clear, appropriate, and correct	Somewhat confusing, incorrect, or flawed	Confusing, incorrect, or flawed	
Clarity	Logical, interesting sequence	Logical sequence	Unclear sequence	No sequence	
Presentation	Clear voice and precise pronunciation	Clear voice and mostly correct pronunciation	Low voice and incorrect pronunciation	Mumbling and incorrect pronunciation	
Visual Aids	Attractive, accurate, and grammatically correct	Adequate, mostly accurate, and few grammatical errors	Poorly planned, somewhat accurate, and some grammatical errors	Weak, inaccurate, and many grammatical errors	
Length	Appropriate length	Slightly too long or short	Moderately too long or short	Extremely too long or short	
Eye Contact	Maintains eye contact, seldom looking at notes	Maintains eye contact most of time but frequently returns to notes	Occasionally uses eye contact but reads most of information	No eye contact because reading information	
				TOTAL	

Comments:

Employee Performance Presentation Evaluation Form

Name:_____ Date: _____

1. List five main ideas expressed in the presentation.

    1. _____

    2. _____

    3. _____

    4. _____

    5. _____

2. If you were a manager or supervisor, how would you apply this information in the workplace?

_____

_____

_____

_____

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_____

Group Work Assessment Rubric

NAME: _____   DATE: _____   PERIOD: _____

	Highly Successful 3 points	Meeting Success 2 points	Experiencing Difficulty 1 point	Score
Sharing	Shared ideas with others	Occasionally shared ideas with others	Seldom shared ideas with others	
Listening	Always listened to peers	Occasionally listened to peers	Ignored ideas of peers	
Respecting	Interacted with, encouraged, and supported ideas of others	Occasionally encouraged and supported others	Seldom encouraged and supported others	
Participating	Shared task equally with group members	Did most of the task	Did very little of the task	
			TOTAL	

Comments:

Guest Speaker Evaluation Form

Student's Name: _____

Date: _____

Name of Speaker: _____

1. List five main ideas expressed in the presentation.

    1. _____
    2. _____
    3. _____
    4. _____
    5. _____

2. Write a brief summary relating the topics of the presentation to your life.

_____

_____

_____

_____

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_____

_____

_____

Guest Speaker Evaluation Form

Student's Name: _____

Guest Speaker's Name: _____

Date: _____

1. Please evaluate the following statements with a check mark in the appropriate space:

Key: SA – Strongly Agree, A – Agree, N – Neutral, D – Disagree, SD, Strongly Disagree

	SA	A	N	D	SD
The presentation stimulated my interest.	( )	( )	( )	( )	( )
Content was clearly presented.		( )	( )	( )	( ) ( )
Content was challenging.	( )	( )	( )	( )	( )
Handouts and materials were helpful.		( )	( )	( )	( ) ( )

2. Please rate the guest speaker:

_____ Extraordinary   ____Excellent   ____ Good   ____ Fair   ____Poor

Additional Comments:

3. What was your favorite element of the presentation?

4. What career or lifestyle knowledge did you take from the presentation?

5. What was your favorite part of the presentation?

6. How would you improve or change it?

7. What do you still need or want to know?

Internet Safety Information Sheet

Student's Name: _____Date: _____

1. List five main ideas expressed in the presentation.

1.   _____

2.   _____

3.   _____

4.   _____

5.   _____

2. Write a brief summary relating the topics of the presentation to your life. How would this information help a
   person be safe when using the Internet?

_____

_____

_____

_____

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_____

_____

_____

Interview Assessment Rubric

NAME: _____ DATE: _____ PERIOD: _____

	Excellent 4 Points	Good 3 Points	Needs Improvement 2 Points	Unacceptable 1 Point	Score
Body language **Displays confidence**					
Eye contact **Maintains good eye contact with interviewer**					
Introduction **Provides a self-introduction**					
Handshakes **Extends hand and shakes firmly**					
Dress **Dresses appropriately for an interview, business attire**					
Language **Concise and grammatically correct**					
Questions **Asks appropriate questions, demonstrates a knowledge of the business**					
Closure **Responds appropriately**					
				TOTAL	

Comments:

Listening Skills Questionnaire

Student's Name _____ Date _____

Title of Story _____

    1.   Who were the main characters in the story?

    2.   Describe one of the characters in the story.

    3.   What happened in the story?

    4.   What was the conflict?

    5.   How was the conflict resolved?

6. What was your favorite part of the story?

MS SBA Registration and Licensing Procedures Checklist

NAME: _____ DATE: _____ PERIOD: _____

Have students investigate the Web site of the Mississippi Small Business Development Center's State Office available at http://www.olemiss.edu/depts/mssbdc/FAQ.html to determine procedures for registration and licensing. Have them develop a brochure that outlines the procedures.

Criteria   Points

1.   Brochure is designed according to standard design principles as outlined   /50

      in the *12 Rules of Desktop Publishing* (http://desktoppub.about.com/cs/basics/f/dtp_rules.htm).

2.   Brochure lists and describes procedures for registration and licensing.   /30

3.   Brochure copy is original work and is not plagiarized.   /30

4.   Sources are cited in correct APA style.   /30

5.   Brochure contains no grammar, spelling, or typographical errors.   /30

6.   All Web-based sources are credible.   /30

TOTAL SCORE   _____

Highest Possible Score   200

Portfolio Evaluation Checklist

Criteria	Points
1. Portfolio is bound neatly in a three-ring binder.	/20
2. Title page is properly formatted with no typographical errors.	/20
3. Table of contents is properly formatted with no typographical errors.	/20
4. A labeled section divider is included for each unit.	/20
5. Five activities are included in each section.	/20
TOTAL SCORE	_____
TOTAL POSSIBLE SCORE	100

Poster Assessment Rubric

NAME: _____ DATE: _____ PERIOD: _____

	Exemplary 4 Points	Accomplished 3 Points	Developing 2 Points	Beginning 1 Point	Score
Required Content	The poster includes all required content elements as well as additional information.	All required content elements are included on the poster.	All but one of the required content elements are included on the poster.	Several required content elements were missing.	
Labels	All items of importance on the poster are clearly labeled with labels that are easy to read.	Almost all items of importance on the poster are clearly labeled with labels that are easy to read.	Many items of importance on the poster are clearly labeled with labels that are easy to read.	Labels are too small to read, or no important items were labeled.	
Attractiveness	The poster is exceptionally attractive in terms of design, layout, and neatness.	The poster is attractive in terms of design, layout, and neatness.	The poster is acceptably attractive though it may be a bit messy.	The poster is distractingly messy or very poorly designed.	
Grammar	There are no grammatical or mechanical mistakes on the poster.	There are one to two grammatical or mechanical mistakes on the poster.	There are three to four grammatical or mechanical mistakes on the poster.	There are more than four grammatical or mechanical mistakes on the poster.	
				TOTAL	

Comments:

Presentation Assessment Rubric

NAME: _____   DATE: _____   PERIOD: _____

|	Exemplary 4 points	Accomplished 3 points	Developing 2 points	Beginning 1 point	Score
Content	Clear, appropriate, and correct	Mostly clear, appropriate, and correct	Somewhat confusing, incorrect, or flawed	Confusing, incorrect, or flawed	
Clarity	Logical, interesting sequence	Logical sequence	Unclear sequence	No sequence	
Presentation	Clear voice and precise pronunciation	Clear voice and mostly correct pronunciation	Low voice and incorrect pronunciation	Mumbling and incorrect pronunciation	
Visual Aids	Attractive, accurate, and grammatically correct	Adequate, mostly accurate, and few grammatical errors	Poorly planned, somewhat accurate, and some grammatical errors	Weak, inaccurate, and many grammatical errors	
Length	Appropriate length	Slightly too long or short	Moderately too long or short	Extremely too long or short	
Eye Contact	Maintains eye contact, seldom looking at notes	Maintains eye contact most of time but frequently returns to notes	Occasionally uses eye contact but reads most of information	No eye contact because reading information	
				TOTAL	

Comments:

Reflection
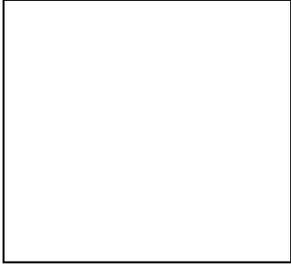
Something I learned that SQUARED with my beliefs:
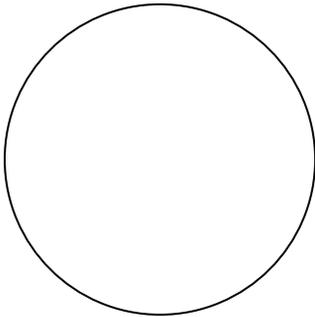
A question going AROUND in my mind:
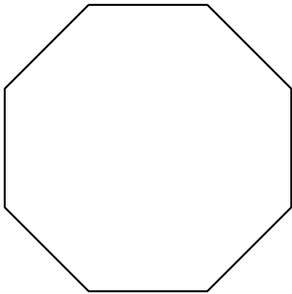
STOP! How do I plan to implement what I have learned?
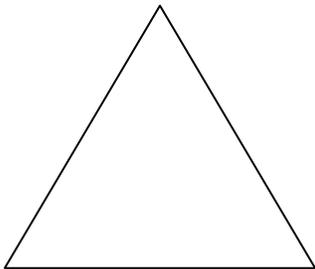
Three important POINTS to remember are the following:

Resume Assessment Rubric

	Excellent 25 Points	Well Done 20 Points	Meets Standards 15 Points	Beginning 10 Points	No Evidence 0 Points	Score
Format	Resume contains name, address, objective, education, experience, and references. All words are spelled correctly.	Contains at least six of the criteria, no more than two spelling errors	Contains at least five of the criteria, no more than four spelling errors	Contains minimal information, more than four spelling errors	Assignment not submitted	
Education	Education includes all schools attended, graduation dates, diploma/degree awarded, and major field of study.	Education includes three of the criteria.	Education includes two of the criteria.	Education includes one of the criteria.	Assignment not submitted	
Experience	Experience includes internships, entry-level jobs, and current position.	Experience includes two of the criteria.	Experience includes one of the criteria.	Experience includes current position only.	Assignment not submitted	
Factual	Contains factual names and dates and is believable	Contains fairly believable resume with factual names or dates	Resume has unrealistic dates or names.	Resume is unrealistic and contains conflicting information.	Assignment not submitted	
					TOTAL	

Comments:

Role-play or Skit Assessment Rubric

NAME: DATE: PERIOD:

	Excellent 4 Points	Good 3 Points	Average 2 Points	Needs Improvement 1 Point	Score
Accuracy	All information was accurate.	Almost all information was accurate.	Most information was accurate.	Very little information was accurate.	
Role	Excellent character development; student contributed in a significant manner	Good character development; student contributed in a cooperative manner	Fair character development; student may have contributed	Little or no character development; student did not contribute much at all	
Knowledge Gained	Can clearly explain several ways in which his or her character "saw" things differently than other characters and can explain why	Can clearly explain several ways in which his or her character "saw" things differently than other characters	Can clearly explain one way in which his or her character "saw" things differently than other characters	Cannot explain any way in which his or her character "saw" things differently than other characters	
Props	Used several props and showed considerable creativity	Used one or two appropriate props that made the presentation better	Used one or two props that made the presentation better	Used no props to make the presentation better	
Required Elements	Included more information than required	Included all required information	Included most required information	Included less information than required	
				TOTAL	

Comments:

Safety Presentation Assessment Rubric

NAME: _____   DATE: _____   PERIOD: _____

	Exemplary 4 points	Accomplished 3 points	Developing 2 points	Beginning 1 point	Score
Content	Procedures met OSHA/EPA regulations.	Procedures mostly met OSHA/EPA regulations.	Procedures somewhat met OSHA/EPA regulations.	Procedures did not meet OSHA/EPA regulations.	
Clarity	Logical, orderly sequence	Logical sequence	Unclear sequence	No sequence	
Presentation	Clear voice and correct pronunciation of all words	Clear voice and pronounced no more than one word incorrectly	Low voice and pronounced two to three words incorrectly	Mumbling and pronounced more than three words incorrectly	
Design	Used appropriate design principles; no typos; grammatically correct	Presentation contained one design error and/or one grammatical error.	Presentation contained two to three design and/or grammatical errors.	Presentation contained more than three design and/or grammatical errors.	
Length	Included 10 slides and lasted 10 minutes	Included seven to nine slides and lasted 7 to 9 minutes	Included five to six slides and lasted 5 to 6 minutes	Included less than five slides and lasted less than 5 minutes	
Eye Contact	Maintained eye contact with audience members at various locations in the room	Maintained eye contact most of the time; looked only at one section of the audience	Read from notes; occasionally glanced at the audience	Made no eye contact because information was being read from notes	

Saving and Investing Information Sheet

Student's Name: _____Date: _____

1. List five main ideas expressed in the presentation.

    1.   _____

    2.   _____

    3.   _____

    4.   _____

    5.   _____

2. Write a brief summary relating the topics of the presentation to your life. How would this information be helpful to a person who plans to start a business?

_____

_____

_____

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_____

_____

Sources of Government Funding Brochure Checklist

NAME: _____ **DATE:** _____ **PERIOD:** _____

Criteria **Points**

1. Brochure is designed according to standard design principles as outlined   /50

    in the *12 Rules of Desktop Publishing* (http://desktoppub.about.com/cs/basics/f/dtp_rules.htm).

2. Brochure lists and describes sources of government funding for all
    countries listed in the assignment.   /20

3. Pros and cons of funding sources are listed.   /20

4. Brochure copy is original work and is not plagiarized.   /30

5. Sources are cited in correct APA style.   /30

6. Brochure contains no grammar, spelling, or typographical errors.   /30

7. All Web-based sources are credible.   /20

TOTAL SCORE   _____

Highest Possible Score   200

Travel Portfolio Evaluation Checklist

NAME: **DATE:**   **PERIOD:**

Criteria	Points
1. Portfolio is bound neatly in a three-ring binder.	/20
2. Cover is designed according to standard design principles.	/30
3. Table of contents is properly formatted with no typographical errors.	/20
4. All components are included:	/30

         Itinerary

         Flight schedules

         Layovers

         Planned meal reservations

         Car rental and ground transportation information

         Hotel accommodations, including prices and driving directions

Criteria	Points
5. Itinerary is properly formatted with no typographical errors.	/30
6. A labeled section divider is included for each component.	/10
7. Portfolio includes a properly formatted travel budget.	/30
8. Trip adheres to established budget limitations.	/30

TOTAL SCORE   _____

Highest Possible Score   200

Understanding the Fundamentals of Business and Economics Presentation Questionnaire

Name: _____ Date: _____

1. List five main ideas expressed in the presentation.

    1. _____

    2. _____

    3. _____

    4. _____

    5. _____

2. Write a brief summary relating the topics of the presentation to your career goals. How could this information be applied in the management or ownership of a business?

Venture Ideas Questionnaire

Name: _____ Date: _____

1. List five business ventures about which you have learned.

   1. _____

   2. _____

   3. _____

   4. _____

   5. _____

2. Write a brief summary of one business venture that captured your interest. Explain why you might be interested in starting a similar business venture. What skills do you have that would be useful in this venture? What additional skills would be needed for this venture?

_____

_____

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_____

Web Page Evaluation Checklist

NAME: _____   **DATE:** _____   **PERIOD:** _____

Review the Web page evaluation criteria described in detail on the following Web site:

- Evaluating Web Pages: http://library.duke.edu/services/instruction/libraryguide/evalwebpages.html

Answer each of the questions below to determine whether a Web site is a high-quality, credible reference.

Authority—What are the author's qualifications? What organization or institution published the information?

Accuracy—What is the purpose of the document? Who is the intended audience? Why was the document created?

Objectivity—Is the information detailed? Is the page primarily intended for advertising? Is the author biased?

Currency—Is there a publication date? Is the information current?

Support—Does the page include additional links or sources? Is there a bibliography?

Written Report Assessment Rubric

NAME: DATE: PERIOD:

	Exemplary 4 Points	Accomplished 3 Points	Developing 2 Points	Beginning 1 Point	Score
Content	Clear thesis and focus that remain apparent	Thesis and focus that remain apparent	Addresses subject matter with minimal support	Does not focus on topic	
Grammar	Correct and effective use of grammar and mechanics	Occasional errors in use of grammar and mechanics	Problems in use of grammar and mechanics	Repeated errors in use of grammar and mechanics	
Organization	Ideas flow smoothly and logically with clarity and coherence.	Logical order and appropriate sequencing of ideas with adequate transition	Some evidence of an organizational plan or strategy	Lacks organization	
				TOTAL	

Comments: