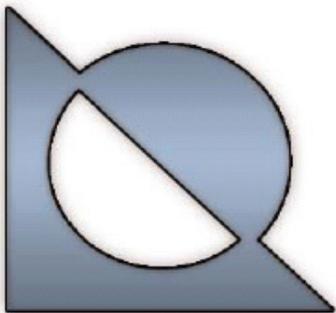


*A Guide to
Work based Learning Skill Standards*

Business & Information Technology



WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology



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Foreword

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This We Believe About the Relationship Between Business Education and Students' Transition to Work

In the current high-performance, results-oriented workplace, everyone must be able to make decisions and learn independently. To succeed in this evolving and unpredictable environment, students need a variety of academic and technical skills as well as career preparation experiences. Employers provide input essential in identifying skills considered vital in the workplace. Educators and employers partner to develop the structures and support for students to acquire the skills needed for employment and continuing education.

Educators use transition-to-work strategies to engage all students in a rigorous and relevant curriculum, to provide them with life and career connections, and to have them explore ever-changing and challenging opportunities in the workplace. Students are motivated and learn best when they understand the relevance of their instruction.

Partnerships

We Believe That through partnerships with business a bridge between education and workplace settings is created. The strength of this bridge is directly related to how well the partners communicate and coordinate their efforts. Partnerships with business are a natural and, in most cases, a required part of every business education program. When these relationships are established, business partners respect what business educators do, learn to rely on the quality of the programs, and have confidence that students are prepared for the workplace. This connection provides real-world experience and builds a clearer motivation for learning. As a result, the more students can relate what they are learning in school to what takes place outside of school, the more connected they become with their own individual school-to-career plans.

We Believe That every student needs a broad understanding of critical aspects of business. Through business partnerships and business education curricula, students:

- Gain knowledge that addresses history, organization, and systems of the work world.
- Gain experience in putting together a business plan and learn how to manage and conduct the day-to-day operations of a business.
- Think critically about the advantages and disadvantages of different types of organizational structures.
- Use financial analysis techniques to determine the profitability of a business enterprise.
- Develop human relations skills and have opportunities to work cooperatively as team members.
- Understand how local, state, national, and international issues affect businesses.
- Develop technological competence.

This knowledge is valuable across all career paths and essential for employment. Business education is the foundation for a broad understanding of these critical aspects of business.

Programs of Study

We Believe That business education programs provide rich opportunities for real-world learning experiences for all students. These opportunities reinforce high academic standards while providing authentic contexts where students are able to apply what they have learned. School-based experiences include vocational student organizations, field trips, guest speakers, and in-school enterprises. Work-based experiences include internships, apprenticeships, cooperative work programs, paid work experiences, job shadowing, community service, and service learning. The unique ability to bridge the gap between theoretical classroom learning and actual workplace experiences is an essential component in students' making successful transitions to work and, ultimately, careers.

We Believe That business education provides a coherent plan to create a personalized learning environment. Through business education, students undertake an ambitious academic program made relevant by its connection to the community and the workplace. Critical to the success of a coherent plan is the inclusion of parents, counselors, and others significant to the student's support system. In the elementary and middle school years, business awareness and exploration activities are integrated into ongoing experiences to provide students initial connections to the world around them. In the high school years, core academic subjects and business education courses provide a broad career perspective. In the post-secondary years, students move from broad to specific career preparation. Business education courses are usually grouped into program sequences or career pathways that facilitate students' transition to work and additional education.

Essential Skills

We Believe That business education is essential for the preparation of students as knowledge workers. Individuals must have the skills to gather, create, and analyze data to produce usable information. Today's businesses, therefore, expect employees to be able to make appropriate decisions about lifelong learning needed in their chosen careers. Students can achieve technical competence, understand theory, apply academic skills in a meaningful way, and integrate career development into satisfying career choices when they participate in the business education program. The ability to bridge the gap between theoretical learning in the classroom and actual practice in the work environment is the essential component in students making a successful transition to work.

Thus, We Believe That business education programs enable students to develop skills essential for successful transition from school to work and, ultimately, careers.

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Introduction

Business activities are such an integral part of the day-to-day routine that most people do not realize the importance or scope of the American business enterprise system. The *National Standards for Business Education* and the *Wisconsin Model Academic Standards for Business* both use a comprehensive curriculum model which includes career development. The content of career development should allow a student to gain a developmental understanding of his/her own skill strengths and weaknesses, the evolving requirements of the workplace, and the relationship of lifelong learning to career success. Within the business classroom, a student should develop an awareness of career opportunities and skills to become employable in a variety of business careers.

The *Wisconsin Guide to Work-Based Learning Skill Standards – Business & Information Technology* is designed to aid the business instructor, workplace mentor, and school-to-work coordinator in delivering the standards and to provide examples of activities to deliver these standards. These activities, however, should only be used as catalysts for instruction.

It is also recommended that the business instructor research industry skill certificates, youth apprenticeship options, and post-secondary articulation opportunities when designing curriculum and learning activities. By aligning curriculum to multiple competencies and skills, business instructors will help students meet workplace expectations.

This guide is designed to develop students' comprehensive competence and lead toward making wise career transitions and to continuously learn new skills and knowledges. As requirements of the workplace evolve, it is the intent of the taskforce that this guide be reviewed and updated annually to include new activities and suggestions from business instructors, workplace mentors, and school-to-work coordinators.

Course Information

Work-Based Learning Skill Standards, Business

Target Population

High school junior or senior student whose career goals and abilities can be matched with a suitable workplace.

Prerequisites

1. Each local work-based learning program determines the prerequisite skill necessary before a student can be eligible for the program.
2. There is an expectation that each student will have had career decision-making experiences and will have made an initial selection of a career major before entering the skill standards program.

Course Description

The *Wisconsin Guide to Work-Based Learning Skill Standards – Business & Information Technology* is designed in partnership with business and education around the integration of school-based and work-based learning and includes appropriate career development experiences. The skill standards certificates are based on recognized state and national employability, business, and workplace skills. The program provides paid work experience for high school junior or senior students, contributing substantially to their educational and occupational development. The skills are achieved in related classroom instruction and through learning experiences in the workplace which are mentored and assessed. The workplace affords students the opportunities necessary to achieve skills, knowledge, and attitudes identified by business and industry for success on the job.

Portfolio and Final Evaluation

The portfolio and final evaluation is comprised of four sections: Section I: Employability Skills, Section II: Business Skills, Section III: Portfolio/Evidence, and Section IV: Workplace Skills. Sections I, II, and III are the primary responsibility of the classroom teacher and may be achieved through multiple courses, teachers, and school years. The skills in these sections are based upon national and state academic standards. Section IV becomes the primary responsibility of the workplace mentor.

For Section III, the expectation for each student is to have a completed portfolio that includes documentation of each of the skills and activities for the other three sections at the completion of the program. This documentation may be in a hard-copy binder format or in an electronic format. The purpose of the portfolio is to provide documentation and evidence of the skills a student has learned and demonstrated in the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* program. In addition, students should include any industry certificates and post-secondary credits earned.

Final Evaluation/Portfolio

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology

Coop Areas Completed

- Employability Skills
- WI Employability Skills Certificate OR Workplace Readiness Assessment (NOCTI)
- AND
- Job Campaign Materials
- AND
- Other (Optional)
- Business Skills
 - Business Foundation (minimum 20 standards)
 - Finance (minimum 10 standards)
 - Information Systems (minimum 10 standards)
 - Management (minimum 15 standards)
- Portfolio/Evidence
- Workplace Skills (criteria met in all areas)

Start Date _____

End Date _____

Student Information

Student _____

Phone _____

School _____

Phone _____

Teacher Coordinator _____

Phone _____

Workplace _____

Phone _____

Workplace Mentor _____

Phone _____

Other Information:



Section I: Employability Skills – Must complete A and B

A	Wisconsin Employability Skills Certificate OR Workplace Readiness Assessment (NOCTI)	To receive the WI Employability Skills Certificate, this score should be reported separately. DO NOT include this score in the final score reported for the B&IT Cooperative Skills Standard Certificate.	Score _____ Date Completed _____
B	Job Campaign Materials (includes resume, application form, letter of recommendation, interview)		Score _____ Date Completed _____
C	Other as identified by local teacher coordinator (optional)		Date Completed _____

Section II: Business Skills – Must demonstrate minimum standards in each of the four areas

- 3 Proficient—able to perform entry-level skills independently.
- 2 Intermediate—has performed task; may need additional training or supervision.
- 1 Introductory—is familiar with process but is unable, or has not had the opportunity, to perform task; additional training is required.

SB—School-based
WB—Work-based

Business Foundations (minimum of 20 standards must be achieved at level 2 or 3)

Standard	Rating			Location		Comments
	3	2	1	SB	WB	
Communication (WI State Business Education Standards)						
A.BS.1 Research and write business-specific technical reports that incorporate graphic aids (see LA B.12.1, B.12.2, B.12.3, E.12.1)						
A.BS.2 Analyze and respond to complex business case studies						
A.BS.3 Edit business documents to improve content and effectiveness (see LA B.12.2)						
A.BS.4 Compose, edit, and produce executive summaries (see LA B.12.1, B.12.2, B.12.3)						
A.BS.5 Give a formal presentation using appropriate graphics, media, and support materials (see LA C.12.1, E.12.3)						
A.BS.6 Present point of view on a current business issue						
A.BS.7 Serve effectively as an interviewer or interviewee in public relations, civic, media, and community situations (see LA F.12.1)						
A.BS.8 Evaluate media and oral presentations analytically and critically (see LA C.12.3, E.12.4)						
A.BS.9 Preside at meetings						
A.BS.10 Use negotiation strategies to resolve a conflict						
A.BS.11 Demonstrate the ability to satisfy a customer's request						
A.BS.12 Prepare and deliver a presentation for a specific business purpose						
A.BS.13 Participate in and evaluate mock interviews						
A.BS.14 Discuss the importance of verbal and nonverbal communications during an interview						

Computation (National Business Education Standards, no WI counterpart)							
I.	Apply basic mathematical operations to solve problems						
II.	Solve problems involving whole numbers, decimals, fractions, percents, ratios, averages, and proportions						
III.	Use algebraic operations to solve problems						
IV.	Use common international standards of measurement when solving problems						
V.	Analyze and interpret data using common statistical procedures						
VI.	Use mathematical procedures to analyze and solve business problems						
Interpersonal and Leadership (WI State Business Education Standards)							
J.BS.1	Practice appropriate interpersonal skills in a business setting						
J.BS.2	Plan and present short presentations individually or as a member of a team						
J.BS.3	Demonstrate an acceptance of different cultural beliefs and practices						
J.BS.4	Demonstrate successful listening techniques						
J.BS.5	Demonstrate professional behavior in the work environment						
J.BS.6	Participate as a member of a team in a business environment						
J.BS.7	Use appropriate etiquette when relating to business people of various cultures						
J.BS.8	Demonstrate effective consensus-building techniques in a group situation						
J.BS.9	Identify ways in which honesty and integrity of co-workers affect work performance						
J.BS.10	Lead a committee or preside at a meeting						
J.BS.11	Explain the different roles people assume when working in groups						
Business Foundations: Total Possible = 93 points (minimum required = 40 points)						Total Earned	

Finance (minimum of 10 standards must be achieved at level 2 or 3)							
Standard		Rating			Location		Comments
		3	2	1	SB	WB	
Financial Procedures (WI State Business Education Standards)							
C.12.1	Calculate simple interest on loans (see M D.12.3)						
C.12.2	Maintain and reconcile a checking account						
C.12.3	Prepare a budget of personal income and expenses						
C.12.4	Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications						
C.12.5	Construct and read charts, tables, and graphs that summarize data from real world situations (see M F.12.2)						
C.12.6	Use calculators appropriately to aid computations and understanding (see M B.4.5)						
C.12.7	Contrast rental, lease, or purchase options of property						
C.12.8	Prepare a simple income tax form						
C.12.9	Contrast short- and long-term investment options						

Section III: Portfolio/Evidence

Portfolio (includes documented evidence of skills and standards completed)

Note: This information is not factored into the completer score; however, it is understood that students would complete a portfolio evidencing their skills to be shared with the Workplace Mentor, parents, and Teacher Coordinator.

Date Completed _____

Section IV: Workplace Skills (Must meet expectation in all areas)

This information is not factored into the completer score; however, it is understood that students should meet or exceed workplace expectations in this areas.

	Meets Expectation	Does Not Meet Expectation
A Work Ethic		
B Workplace Communication		
C Workplace Technologies		
D Workplace Relationships		
E Workplace Diversity		
F Workplace Safety		
G Lifelong Learning		
H Other		

Comments:

Student Signature

Date

Parent Signature

Date

Workplace Mentor Signature

Date

Teacher Coordinator Signature

Date

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology Portfolio Final Evaluation – Condensed

Student	School	School Year	Date
Teacher	Workplace		

Section I. Employability Skills – Must complete A and B

A	Wisconsin Employability Skills Certificate To receive the WI Employability Skills Certificate, this score should be reported separately. DO NOT include this score in the final score reported for the B&IT Cooperative Skills Standard Certificate. OR Workplace Readiness Assessment (NOCTI)	Score _____ Date Completed _____
		Score _____ Date Completed _____
B	Job Campaign Materials (includes resume, application form, letter of recommendation, interview)	Date Completed _____
C	Other as identified by local teacher coordinator (optional)	

Section II. Business Skills – Must demonstrate stated minimum standards in each of the four areas

Utilize the Standards Matrix in the Appendix of the Guide to Work-Based Learning Skill Standards—Business & Information Technology.

Business Foundations <i>(minimum 20 standards at level 2 or 3)</i>	Communication Computation	Section Score _____ Total Points Possible = 93 points (minimum required = 40 points)
Finance <i>(minimum 10 standards at level 2 or 3)</i>	Accounting Economics Personal Finance	Section Score _____ Total Points Possible = 81 points (minimum required = 20 points)
Information Systems <i>(minimum 10 standards at level 2 or 3)</i>	Information Technology	Section Score _____ Total Points Possible = 78 points (minimum required = 20 points)
Management <i>(minimum 15 standards at level 2 or 3)</i>	Business Law Entrepreneurship International Business Management Marketing	Section Score _____ Total Points Possible = 186 points (minimum required = 30 points)
Business Skills Total Points: (minimum required = 110)		
Add totals from Business Foundations, Finance, Information Technology, & Management sections. <i>This score is reported as the student's Completer Score to finalize a student's skill standard certificate.</i>		Completer Score

Section III. Portfolio/Evidence

Portfolio (includes documented evidence of skills and standards completed) Note: This information is not factored into the completer score; however, it is understood that students would complete a portfolio evidencing their skills to be shared with the Workplace Mentor, parents, and Teacher Coordinator.	Date Completed _____
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Section IV. Workplace Skills (Must meet expectation on all areas)

This information is not factored into the completer score; however, it is understood that students should meet or exceed workplace expectations in this areas.	Meets Expectation	Does Not Meet Expectation
A Work Ethic		
B Workplace Communication		
C Workplace Technologies		
D Workplace Relationships		
E Workplace Diversity		
F Workplace Safety		
G Lifelong Learning		

Workplace Mentor Signature	Date
Teacher Coordinator Signature	Date

Section I – Employability Skills

Career development encompasses an individual’s total life. In our changing society, career enhancements and career changes will become common. Individuals must be able to use the tools, resources, and guidance made available to them to make informed decisions. Students in Wisconsin will explore careers and develop skills necessary to make meaningful decisions in a variety of business careers. Students will develop a career cluster focus based on their career development process.

To complete the Employability Skills portion of the State Certified Skills Cooperative Program, students are to complete Parts A and B of this section. Part C is optional and may be an additional classroom requirement or district graduation requirement, such as job shadowing or community service hours. Part A should be completed through either the Wisconsin Employability Skills Certificate or through the NOCTI Workplace Readiness Assessment. Since the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* certificate includes a Workplace Skills section for workplace mentors, it is intended that the Employability Skills section would be completed by the teacher.

Part A: Wisconsin Employability Skills Certificate

The *Employability Skills Certificate Program* is intended to recognize a student’s mastery of employability skills valued by employers. Every employment opportunity today requires the application of knowledge and skills in a real world context. To that end, the Employability Skill Certificate Program is designed around students attaining skill proficiency in those core employment skills identified by the U.S. Department of Labor Secretary’s Commission on Achieving Necessary Skills (SCANS). The employability skills in this program have been identified through the SCANS in partnership with educators, business, industry, and labor representatives. As an integration of academic knowledge in an applied setting, the SCANS competencies build a bridge between school and the workplace.

Research surrounding these recommendations verifies the philosophy of workplace know-how and further defines effective job performance expectations today. The research clearly shows that workplace knowledge consists of two fundamental concepts (competencies and a foundation) which are core employability skills essential for all students, both those entering the work force directly from high school and those planning a post-secondary education.

Students completing all program requirements will earn a state certificate that represents the achievement of skill competencies designed to support integrated/applied curriculum and project-based learning. The certificate will be issued by the Department of Public Instruction (DPI). For more information regarding the Employability Skills Certificate, please refer to Appendix B or refer to the DPI Workbased Education website at www.dpi.state.wi.us/dpi/dlsis/let/workbase.html.

The supervising teacher will need to register each participating student in the “Employability Skills Certificate” program. This is a separate registration from the Work-Based Learning Skills Standards. In essence, a student will be registered **twice, once for each program**. The Employability Skills Certificate can be used as a stand-alone certificate or **used in conjunction with** a Work-Based Learning Skills Standards program. To register, go to: http://www2.dpi.state.wi.us/CTE_Skills/dpi_login/dpi_login.asp.

OR

Part A: NOCTI Workplace Readiness Assessment

The National Occupational Competency Testing Institute (NOCTI) is a provider of occupational competency assessments and services. NOCTI's Job Ready tests are designed to measure an individual's knowledge of basic processes including the identification and use of terminology and tools. Job Ready tests can be used for both secondary and post-secondary education as well as business and industry applications. The purposes of these tests are to:

- Measure curriculum effectiveness
- Improve instructional methods
- Successfully link the world of education with the world of work
- Enhance the transition between school and work

The Workplace Readiness Assessment is an 82-question online assessment with a maximum of 3 hours to complete. Immediate raw results will be provided online, and hard-copy comparative analysis will be shipped within five business days.

The areas covered in the NOCTI assessment are:

- Communications
- Problem Solving and Critical Thinking
- Information Technology Applications
- Systems
- Safety, Health and Environment
- Leadership, Management and Teamwork
- Ethics and/or Legal Responsibilities
- Employability and/or Career Development

To utilize this assessment, supervising teachers should contact the NOCTI headquarters at 800-334-6283 or visit their website at www.nocti.org. Appendix C also includes additional information.

Part B: Job Campaign Materials

The job campaign refers to the package of documents that is assembled during a job search. Although classroom teachers may have units developed that encompass a job campaign, it is critical that all students complete the standard job campaign documents. These documents include a letter of application, a job application, an interview or mock interview, and a follow-up letter. It is the teacher's responsibility to ensure that these documents meet acceptable workplace standards. Sample rubrics for these documents are included in Appendix D.

Part C: Other

In lieu of specific district or program requirements, a supervising teacher may require other documents or experiences of participating students in order to complete this certificate. It is up to the teacher's discretion what this requirement may be and the documentation for such experiences. This requirement may include, but is not limited to, job shadowing, community service hours, interviewing a professional in the field, etc.

Section II – Business Skills

The skills in this section are based upon national and state standards. The *Wisconsin’s Model Academic Standards for Business* is designed to develop students’ comprehensive competence. They begin engaging elementary students in the excitement of the study of business and lead them progressively to higher levels of rigor in each succeeding level. At the completion of secondary school, students should be able to:

- Function as economically literate citizens through the development of personal consumer economic skills, knowledge of social and government responsibility, and an understanding of business operations.
- Demonstrate interpersonal teamwork and leadership skills necessary to function in multicultural business settings.
- Develop career awareness and related skills to enable them to make viable career choices and become employable in a variety of business careers.
- Select and apply the tools of technology as they related to personal and business decision-making.
- Communicate effectively as writers, listeners, and speakers in social and business settings.
- Use accounting procedures to make decisions about planning, organizing, and allocating resources.
- Apply the principles of law in personal and business settings.
- Prepare to become entrepreneurs by drawing from their general understanding of all aspects of business.
- Understand the interrelationships of different functional areas of business and the impact of one component on another.
- Develop the ability to participate in business transactions in both the domestic and international arenas.
- Develop the ability to market the assets each individual has whether they be in the labor market or in the consumer goods market.
- Manage data from all of the functional areas of business needed to make wise management decisions.
- Utilize analytical tools needed to understand and make reasoned decisions about economic issues—both personal and societal.

Standards used in creating activities and skills sets in the *Wisconsin Work-Based Learning Skill Standards – Business & Information Technology* guide are based upon the Performance Standards at the level of Business Students in the *Wisconsin’s Model Academic Standards for Business*. This level of standards is developed for students completing advanced business courses and programs such as the workbased education program. These standards are also cross-referenced to the standards for English Language Arts (LA), Mathematics (M), and Social Studies (SS). These standards are neither a full curriculum nor requirement for daily instructional practice. School districts can use these standards to build a course and work experience specific to their students’ needs.

Although a comprehensive list of standards is provided for each content area in business, it is not intended the entire list of standards be included in this one course. They are provided as a reference for curriculum writing and activity development.

The curricular areas from the *Wisconsin’s Model Academic Standards for Business* and the *National Standards for Business Education* have been divided into four areas: Business Foundations, Finance, Information Technology, and Management. A student must demonstrate a proficiency in a minimum number of standards for each area (a score of a two (2) on the minimum standards required):

Standard Area	Minimum Proficiency	Minimum Score	Maximum Score
Business Foundations	10 standards	40	93
Finance	10 standards	20	81
Information Technology	10 standards	20	78
Management	15 standards	30	186
Total Completer Score		110	438

Activities

Although a student's competence in skill is measured through the standards, the activities are the tool to demonstrate those skills. **The activities should integrate workplace information and research into the classroom.**

Activities in this guide are meant to serve as **examples** and are not to be considered all-inclusive. Instructors may use these examples to develop new activities or enhance current activities. The sample activities indicate which standards are addressed to demonstrate how one activity may address multiple standards. A comprehensive list of all business standards is provided in Appendix A.

Rubrics

Rubrics for activities have been included in Appendix D. These rubrics are general and may be adapted to meet the needs of the district, instructor, or classroom. They are guidelines and not requirements for evaluation purposes. It is recommended that rubrics used for activities are developed to define indicators for different levels of performance and to show proficiency or competence in the skill.

Business Foundations

The Business Foundations area encompasses the curriculum of Career Development, Communication, Computation, and Interpersonal and Leadership Skills. These foundation standards permeate all areas of the curriculum and are the underpinning to help students fulfill their roles as citizens, consumers, employees, employers, and entrepreneurs.

Whether in the school setting, workplace, or personal life, it is essential to be an effective writer. Speaking and listening are essential communication skills. Whether in a personal or formal setting, communicators are required to listen, follow instructions, and deliver coherent messages. Communication skills are essential to be successful in the workplace. Students in Wisconsin will communicate in a clear, courteous, concise, and correct manner on both personal and professional levels. Computation skills encompass the ability to solve mathematical problems, analyze and interpret data, and apply sound problem solving skills. In order to be successful, workers need to work independently and with others, demonstrate initiative, and work efficiently in a variety of business environments.

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2007)*. Every standard is not meant to be included in every activity nor should it be expected that all standards will be covered in the course. They are provided here as a reference.

Career Development (National Standards for Business Education)

1. Assess personal skills, abilities, and aptitudes and personal strengths and weaknesses as they relate to career exploration and development.
2. Utilize career resources to develop a career information database that includes international career opportunities.
3. Relate the importance of workplace expectations to career development.
4. Apply knowledge gained from individual assessment to a comprehensive set of goals and an individual career plan.
 - Explain the importance of participation in professional associations, service organizations, and community programs
5. Develop strategies to make an effective transition from school to career.
6. Relate the importance of lifelong learning to career success.

Communication (National Standards for Business Education)

- I. Communicate in a clear, courteous, concise, and correct manner on personal and professional levels
- II. Apply basic social communication skills in personal and professional situations
- III. Incorporate appropriate leadership and supervision techniques, customer service strategies, and personal ethics standards to communicate effectively with various business constituencies.
- IV. Use technology to enhance the effectiveness of communication

Communication (Wisconsin's Model Academic Standards – Business)

- A.BS.1 Research and write business-specific technical reports that incorporate graphic aids (see LA B.12.1, B.12.2, B.12.3, E.12.1)
- A.BS.2 Analyze and respond to complex business case studies
- A.BS.3 Edit business documents to improve content and effectiveness (see LA B.12.2)
- A.BS.4 Compose, edit, and produce executive summaries (see LA B.12.1, B.12.2, B.12.3)
- A.BS.5 Give a formal presentation using appropriate graphics, media, and support materials (see LA C.12.1, E.12.3)
- A.BS.6 Present point of view on a current business issue
- A.BS.7 Serve effectively as an interviewer or interviewee in public relations, civic, media, and community situations (see LA F.12.1)
- A.BS.8 Evaluate media and oral presentations analytically and critically (see LA C.12.3, E.12.4)
- A.BS.9 Preside at meetings
- A.BS.10 Use negotiation strategies to resolve a conflict
- A.BS.11 Demonstrate the ability to satisfy a customer's request
- A.BS.12 Prepare and deliver a presentation for a specific business purpose
- A.BS.13 Participate in and evaluate mock interviews
- A.BS.14 Discuss the importance of verbal and nonverbal communications during an interview

Computation (National Standards for Business Education)

- I. Apply basic mathematical operations to solve problems
- II. Solve problems involving whole numbers, decimals, fractions, percents, ratios, averages, and proportions.
- III. Use algebraic operations to solve problems.
- IV. Use common international standards of measurement when solving problems
- V. Analyze and interpret data using common statistical procedures.
- VI. Use mathematical procedures to analyze and solve business problems.

Interpersonal and Leadership Skills (Wisconsin's Model Academic Standards – Business)

- J.BS.1 Practice appropriate interpersonal skills in a business setting
- J.BS.2 Plan and present short presentations individually or as a member of a team
- J.BS.3 Demonstrate an acceptance of different cultural beliefs and practices
- J.BS.4 Demonstrate successful listening techniques
- J.BS.5 Demonstrate professional behavior in the work environment
- J.BS.6 Participate as a member of a team in a business environment
- J.BS.7 Use appropriate etiquette when relating to business people of various cultures
- J.BS.8 Demonstrate effective consensus-building techniques in a group situation
- J.BS.9 Identify ways in which honesty and integrity of co-workers affect work performance
- J.BS.10 Lead a committee or preside at a meeting
- J.BS.11 Explain the different roles people assume when working in groups

Career Development (Wisconsin's Model Academic Standards – Business)

- K.BS.1 Identify how one's own strengths match skills needed for the business career cluster
- K.BS.2 Develop strategies to acquire skills needed for the business career cluster
- K.BS.3 Identify strategies to use to upgrade and improve performance
- K.BS.4 Explore entrepreneurship opportunities
- K.BS.5 Explain the need for flexible career planning
- K.BS.6 Identify a network of business people who will provide assistance in securing a job
- K.BS.7 Explain the benefits of professional involvement
- K.BS.8 Develop a database of professional organizations related to a chosen career cluster
- K.BS.9 Experience paid school- and work-based opportunities related to the business occupational cluster

Example Activities – Business Foundations

1. Research the numerous positions within your workplace related to a given career cluster and list the types of skills and knowledge necessary for these positions (ie. Finance). Analyze your own skills against the skills and knowledge list create and form a plan to 'upgrade' your skills. (K.BS.1, K.BS.2, K.BS.3, K.BS.9)
2. Deal with a difficult customer appropriately. (A.BS.10, A.BS.11)
3. Prepare a 1040EZ for yourself during the tax season.
4. Compose/send a letter to a local business regarding how their business got started and the challenges it faced in becoming successful. Present this information to a group. (A.BS.3, A.BS.12)

Finance

The Finance area encompasses the curriculum of Accounting, Financial Procedures, Economics, and Personal Finance. Making wise decisions is essential for the economic well being of our country. Students need financial knowledge to ensure they make informed decisions both personally and professionally. Whether it is daily transactions or investments for their future, students must understand how to use resources to develop economic growth. Students in Wisconsin will use financial procedures to make decisions about planning, organizing, and allocating resources.

The American economy is based on a private enterprise system in which the sum total of the millions of individual choices made by consumers, workers, and citizens affect the decisions made by business owners and government officials. In order to make these informed decisions, individuals must clearly understand how the system operates while comprehending their role in the system. Students in Wisconsin will use critical-thinking skills to function as citizens who are literate about economics through development of personal consumer economic skills and a knowledge of societal and governmental responsibility.

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2007)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided here as a reference.

Accounting (National Standards for Business Education)

- Ia. Understand the role that accountants play in business and society.
- Ib. Describe career opportunities in the accounting profession.
- Ic. Demonstrate the skills and competencies required to be successful in the accounting profession and/or in an accounting related field.
- II. Develop an understanding and working knowledge of an annual report and financial statements.
- III. Assess the financial condition and operating results of a company and analyze and interpret financial statements and information to make informed business decisions.
- IV. Identify and describe generally accepted accounting principles (GAAP), explain how the application of GAAP impacts the recording of financial transactions, and the preparation of financial statements.
- V. Complete the steps in the accounting cycle in order to prepare financial statements.
- VI. Use planning and control principles to evaluate the performance of an organization and apply differential analysis and present value concepts to make decisions.
- VII. Develop a working knowledge of individual income tax procedures and requirements to comply with tax laws and regulations.

Economics (National Standards for Business Education)

- I. Assess opportunity costs and trade-offs involved in making choices about how to use scarce economic resources
- II. Explain why societies develop economic systems, identify the basic features of different economic systems, and analyze the major features of the U.S. economic system
- III. Analyze the role of core economic institutions and incentives in the U.S. economy
- IV. Analyze the role of markets and prices in the U.S. economy
- V. Analyze the different types of market structures and the effect they have on the price and the quality of the goods and services produced
- VI. Explain the importance of productivity and analyze how specialization, division of labor, investment in physical and human capital, and technological change affect productivity
- VII. Analyze the role of government in economic systems, especially the role of government in the U.S. economy
- VIII. Examine the role of trade, protectionism, and monetary markets in the global economy
- IX. Analyze how the U.S. economy functions as a whole and describe selected macroeconomic measures of economic activity

Economics (Wisconsin's Model Academic Standards – Business)

- D.12.1 Describe the components of economic activity and illustrate how they interact with each other
- D.12.2 Describe the possible effects of the national debt on the level of economic activity in the long run (see SS D.8.6)
- D.12.3 Explain how consumer legislation may affect consumer product prices (see SS D.12.5)
- D.12.4 Demonstrate an understanding of current local, state, national, and international economic issues (see SS D.12.6, D.12.13)
- D.12.5 Describe the roles of business enterprises, consumers, and government in our mixed economy (see SS D.8.10, D.12.7, D.12.14)
- D.12.6 Explain how interest rates are determined by market forces and how they influence the amount of borrowing and saving by business investors, consumers, and government officials (see SS D.12.11)
- D.BS.1 Explain the basic characteristics of international trade including absolute and comparative advantage, barriers to free trade, exchange rate, and balance of trade
- D.BS.2 Analyze how income will be affected by factors such as supply and demand, location, level of education, type of industry, union or non-union membership, gender, ethnicity, skill levels, work ethics, worker productivity, and market value of what workers produce
- D.BS.3 Understand the necessity for choices and the role of the decision-making process for analyzing individual business and societal decisions
- D.BS.4 Compare and contrast the different types of economic systems (command, market, traditional, and mixed)
- D.BS.5 Explain the concepts of inflation, unemployment, and Gross Domestic Product and describe how they are measured

Financial Procedures (Wisconsin's Model Academic Standards – Business)

- C.12.1 Calculate simple interest on loans (see M D.12.3)
- C.12.2 Maintain and reconcile a checking account
- C.12.3 Prepare a budget of personal income and expenses
- C.12.4 Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications
- C.12.5 Construct and read charts, tables, and graphs that summarize data from real world situations (see M F.12.2)
- C.12.6 Use calculators appropriately to aid computations and understanding (see M B.4.5)
- C.12.7 Contrast rental, lease, or purchase options of property
- C.12.8 Prepare a simple income tax form
- C.12.9 Contrast short- and long-term investment options
- C.BS.1 Identify, prepare, and analyze financial statements
- C.BS.2 Calculate loan payments with different interest rates (see M D.12.3)
- C.BS.3 Determine cash flow for a business
- C.BS.4 Compare budget figures to actual costs
- C.BS.5 Prepare and maintain payroll records
- C.BS.6 Determine manufacturing costs
- C.BS.7 Use technology to maintain, manipulate, and report financial information

Personal Finance (National Standards for Business Education)

- I. Use a rational decision-making process as it applies to the roles of citizens, workers, and consumers
- II. Identify various forms of income and analyze factors that affect income as a part of the career decision-making process
- III. Develop and evaluate a spending/savings plan
- IV. Evaluate savings and investment options to meet short- and long-term goals
- V. Apply a decision-making model to maximize consumer satisfaction when buying goods and services
- VI. Evaluate services provided by financial deposit institutions to transfer funds
- VII. Analyze factors that affect the choice of credit, the cost of credit, and the legal aspects of using credit
- VIII. Analyze choices available to consumers for protection against risk and financial loss

Example Activities - Finance

1. Obtain a copy of your company's quarterly or annual report. Present a brief oral report to your class sharing what is included in this report. Who is the intended audience? What is the purpose of the report? How does the information in the report reflect the financial status of the company? (Financial Procedures C.BS.3, C.BS.4; Communication A.BS.1, A.BS.5, A.BS.12)
2. Complete the necessary individual financial records for your position: W-2 form; time card--figure your weekly or bimonthly wages for your position; and individual state and federal income tax forms. In addition, interview a payroll specialist at your worksite. Develop questions to ask him/her regarding the job responsibilities of this position. (Financial Procedures C.BS.5; Communication A.BS.7, A.BS.14; Interpersonal and Leadership J.BS.4)
3. Research within your worksite how purchases are paid for—i.e. on account? With a credit card? Cash? Compare and contrast the business method of payment to paying with a personal credit card. Be sure to include time, rate, and average amount of purchases in your report analysis. (Financial Procedures C.12.4, C.12.6, C.BS.2; Economics D.BS.2, D.12.6; Communication A.BS.4)
4. Create a chart demonstrating an analysis of your workplace business' profit and loss as compared to a national indicator. You may select, for example, GNP, CPI, unemployment rate, GDP, inflation, etc. for the past five years. Explain the correlation. (Financial Procedures C.12.4, C.12.6, C.BS.2, C.BS.7; Economics D.BS.2, D.12.6, D.BS.5; Communication A.BS.4)

Information Technology

Information Technology is a comprehensive curriculum area that encompasses multiple facets of technology skills including but not limited to word processing, spreadsheets, electronic presentation slideshows, databases, electronic mail, desktop publishing, web design and development, operating systems, and hardware.

Information technology is a problem-solving tool that is not an end goal. It is used to help students complete tasks efficiently and effectively and apply the technology to solve problems. Students must be able to select and apply from the tools available. In order to make informed decisions, the student must learn current technology as well as understand ethical and social issues related to the use of technology. Students in Wisconsin will select and apply current information systems/technology as they relate to personal and business decision-making in light of ethical and social issues. **Demonstration of these standards may also be achieved through industry certifications.**

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2007)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided here as a reference.

Information Technology (National Standards for Business Education)

- I. Assess the impact of information technology on society
- II. Describe current and emerging computer hardware; configure, install, and upgrade hardware; diagnose and repair hardware problems
- III. Identify, evaluate, select, install, use, upgrade, customize, and diagnose and solve problems with various types of operating systems, environments, and utilities
- IV. Use input technologies appropriately to enter and manipulate text and data
- V. Identify, evaluate, select, install, use, upgrade, and customize productivity software; diagnose and solve problems
- VI. Use multimedia software to create media rich projects
- VII. Design, develop, test, implement, update, and evaluate web solutions
- VIII. Gather, evaluate, use, cite, and disseminate information from information technology sources
- IX. Use, plan, develop, and maintain database management systems
- X. Analyze and design information systems using appropriate development tools
- XI. Design, develop, test, and implement programs
- XII. Develop the skills to design, deploy, and administer networks and telecommunications systems
- XIII. Plan the selection and acquisition of information technologies
- XIV. Design and implement security, privacy, and risk management policies and procedures for information technology
- XV. Describe, analyze, develop, and follow policies for managing ethical and legal issues in organizations and in a technology-based society
- XVI. Develop the technical and interpersonal skills and knowledge to support the user and community
- XVII. Describe the information technology components of business functions and explain their interrelationships
- XVIII. Explore positions and career paths in information technology

Information Technology (Wisconsin's Model Academic Standards – Business)

- B.12.1 Access, navigate, and use online services
- B.12.4 Import text and graphics from other software programs
- B.12.6 Restart and recover from system failure and virus infection as necessary
- B.12.12 Analyze spreadsheet data
- B.12.13 Use desktop publishing software to create documents (see LA E.8.3)
- B.12.18 Send and receive faxes
- B.12.19 Use electronic mail
- B.12.20 Send and respond to voice messages
- B.12.21 Sort and file documents according to established procedures
- B.BS.1 Diagnose and solve problems related to the operation of computer equipment
- B.BS.2 Apply special features of software packages such as galleries, templates, macros, etc.
- B.BS.3 Describe how information systems have changed the workplace
- B.BS.4 Explain how information systems have contributed to worker productivity
- B.BS.5 Use data to create information to solve business problems
- B.BS.6 Use desktop publishing software to design, create, and produce a variety of publications (see LA E.8.3)
- B.BS.7 Import data, graphics, and scanned images using desktop publishing software
- B.BS.8 Use multimedia software to design, create, and produce a variety of presentations (see LA E.8.3)
- B.BS.9 Design and create a web page
- B.BS.10 Evaluate application software products in terms of their features
- B.BS.11 Customize application software
- B.BS.12 Generate complex, multipart documents
- B.BS.13 Use operating system commands
- B.BS.14 Generate business forms
- B.BS.15 Generate newsletters and brochures (see LA E.8.3)
- B.BS.16 Create documents by merging information
- B.BS.17 Establish and maintain a records management system

Example Activities – Information Technology

1. Design a three-column newsletter or tri-fold brochure for your workplace. Include company logo, hours of operation, company history or summary, listing of important contact information and other pertinent information. (B.BS.6, B.BS.7, B.BS.12, B.BS.15)
2. On student-designed letterhead, build a form letter and envelopes to potential customers in proper business letter format utilizing merged information from a database or spreadsheet for a minimum of 10 people. Include a chart and/or table in the letter. Create/use a macro for the closing of the letter. (B.BS.2, B.BS.5, B.BS.7, B.BS.16, B.BS.17)
3. Create a multi-slide presentation illustrating how technology has changed your workplace, your position, and/or your company customer base that incorporates a custom background, slide layout, transitions, text animation, clip art, and design templates. Utilize a digital camera, scanned images, and the company logo. (B.BS.2, B.BS.3, B.BS.6, B.BS.7, B.BS.8)

Management

The Management area encompasses the curriculum of Business Law, Entrepreneurship, International Business, Management, and Marketing. The knowledge of law is essential in today's society. Whether the law pertains to an individual or a business, students must understand legal principles in order to be productive citizens and make responsible decisions that protect the individual and society at large. The major components of entrepreneurship incorporate the basic structure of business. Therefore, it is essential for students to have an understanding of entrepreneurship and its place in the education of business. Students in Wisconsin will use business knowledge and preparation to develop an understanding of business operations and the ability and skills necessary to become entrepreneurs.

Businesses are taking on a global focus and workers must be able to participate in both domestic and international environments in order to succeed. Therefore, students need to be able to work in a variety of business and office settings. Students must have the ability to know where to find information needed to make decisions. The knowledge of different function areas of business and what data can be obtained from these areas is essential for students to use in both personal and business management decisions. Students in Wisconsin will select and analyze appropriate information from the business function areas such as marketing, finance, accounting, production, and personnel of business to make informed management decisions.

Marketing is connected to almost every function of business. All people in an organization are responsible for meeting the needs of their consumers and should, therefore, be familiar with the processes involved with marketing.

Standards

The following standards are taken from the *Wisconsin's Model Academic Standards* and the *National Standards for Business Education (2007)*. Every standard is not meant to be included in every activity nor should it be expected all standards will be covered in the course. They are provided here as a reference.

Business Law (National Standards for Business Education)

- I. Analyze the relationship between ethics and the law and describe sources of the law, the structure of the court system, different classifications of procedural law, and different classifications of substantive law
- II. Analyze the relationships between contract law, law of sales, and consumer law
- III. Analyze the role and importance of agency law and employment law as they relate to the conduct of business in the national and international marketplaces
- IV. Describe the major types of business organizations, including sole proprietorships, partnerships, corporations, and limited liability companies, operating within the socioeconomic arena of the national and international marketplace
- V. Explain the legal rules that apply to personal property, real property, and intellectual property
- VI. Analyze the functions of negotiable instruments, insurance, secured transactions, and bankruptcy
- VII. Explain how advances in computer technology impact such areas as intellectual property, contract law, criminal law, tort law, and international law
- VIII. Explain the legal rules that apply to the environmental law and energy regulation
- IX. Explain the legal rules that apply to marriage, divorce, and child custody
- X. Determine the appropriateness of wills and trusts in estate planning

Principles of Law: (Wisconsin's Model Academic Standards – Business)

- I.12.1 Interpret and apply legal principles to business and personal situations
- I.12.2 Differentiate and contrast between felonies and misdemeanors and their penalties
- I.12.3 Understand rights and responsibilities when leasing property
- I.12.4 Identify laws governing credit and credit reporting
- I.12.5 Demonstrate an understanding of legal forms used in business transactions
- I.12.6 Understand laws that govern personal investments and estates
- I.12.7 Identify agencies protecting consumer rights
- I.12.8 Become aware of career opportunities in law-related areas, and understand the technical skills, knowledges, education levels, and skills needed
- I.BS.1 Describe sources of laws and their effect on individuals and society (see SS C.8.3)
- I.BS.2 Identify court systems and procedures (see SS C.8.4)
- I.BS.3 Analyze laws governing starting and maintaining a business
- I.BS.4 List the elements of a business contract, and identify and explain the various types of contracts
- I.BS.5 Demonstrate an understanding of the legislative process, and exhibit an awareness of legislation affecting business
- I.BS.6 Compare and contrast differences in ethical and legal systems from state to state and nation to nation
- I.BS.7 Explain contractual rights and responsibilities
- I.BS.8 Discuss consumer protection legislation
- I.BS.9 Identify contractual capacity
- I.BS.10 Discuss the effects of law on employment relations

Entrepreneurship (National Standards for Business Education)

- I. Recognize that entrepreneurs possess unique characteristics and evaluate the degree to which one possesses those characteristics
- II. Analyze customer groups and develop a plan to identify, reach, and keep customers in a specific target market
- III. Apply economic concepts when making decisions for an entrepreneurial venture
- IV. Use the financial concepts and tools needed by an entrepreneur in making business decisions
- V. Recognize that entrepreneurs must establish, maintain, and analyze appropriate records to make business decisions
- VI. Develop a management plan for an entrepreneurial venture
- VII. Analyze the effect of cultural differences, export/import opportunities, and trends on an entrepreneurial venture in the global marketplace
- VIII. Analyze how forms of business ownership, government regulations, and business ethics affect entrepreneurial ventures
- IX. Develop a business plan

Entrepreneurship (Wisconsin's Model Academic Standards – Business)

- E.BS.1 Research the unique contributions of entrepreneurs in the American economy
- E.BS.2 Given a business dilemma, identify the problem and analyze possible solutions
- E.BS.3 Design a business plan for a specific business
- E.BS.4 Establish a means for building and maintaining customer loyalty
- E.BS.5 Identify impact of outside sources such as labor unions, trade organizations, and competition when establishing a small business
- E.BS.6 Prepare financial statements for a planned business
- E.BS.7 Evaluate the financial condition of a business based on its financial records
- E.BS.8 Diagram the organizational structure of a planned business
- E.BS.9 Describe practices associated with cultural diversity that would impact a business moving from the national to the international marketplace
- E.BS.10 Develop a business plan for a specific business based on the concepts of successful entrepreneurship, and defend the plan to an investor

International Business (National Standards for Business Education)

- I. Explain the role of international business; analyze how it impacts business at all levels, including the local, state, national, and international levels
- II. Describe the interrelatedness of the social, cultural, political, legal, and economic factors that shape and impact the international business environment
- III. Apply communication strategies necessary and appropriate for effective and profitable international business relations
- IV. Describe the factors that define what is considered ethical and socially responsible business behavior in a global business environment
- V. Identify forms of business ownership and entrepreneurial opportunities available in international business
- VI. Relate balance of trade concepts to the import/export process
- VII. Analyze special challenges in operations, human resources, and strategic management in international business
- VIII. Apply marketing concepts to international business situations
- IX. Explain the concepts, role, and importance of international finance and risk management

International Business (Wisconsin's Model Academic Standards – Business)

- G.BS.1 List examples of international trade in the local community
- G.BS.2 Explain advantages and disadvantages of trade agreements between and among nations
- G.BS.3 Identify the relationship between international events and the daily conduct of business
- G.BS.4 Identify international trade partners
- G.BS.5 Explain the role of international business at local, regional, and national levels
- G.BS.6 Explain how time zones around the world affect businesses
- G.BS.7 Compare the resources (e.g., trade routes, transportation centers, foreign trade zones, etc.) of major cities around the world
- G.BS.8 Detail the processes for securing travel documents
- G.BS.9 Explain the role of U.S. Customs and the customs agencies of other countries
- G.BS.10 Identify the role of translators and interpreters in international business settings
- G.BS.11 Use words and phrases important to business people in a given language
- G.BS.12 Explain appropriate business protocol in international business situations

Management (National Standards for Business Education)

- I. Analyze the management functions and their implementation and integration within the business environment
- II. Analyze management theories and their application within the business environment
- III. Analyze the organization of a business
- IV. Develop personal management skills to function effectively and efficiently in a business environment
- V. Examine the role of ethics and social responsibility in decision making
- VI. Describe human resource functions and their importance to an organization's successful operation
- VII. Describe the role of organized labor and its influence on government and business
- VIII. Utilize information and technology tools to conduct business effectively and efficiently
- IX. Analyze a business organization's competitive position within the industry
- X. Analyze financial data influenced by internal and external factors in order to make short-term and long-term decisions
- XI. Apply operations management principles and procedures to the design of an operations plan
- XII. Examine the issues of corporate culture and managing in the global environment

Principles of Management (Wisconsin's Model Academic Standards – Business)

- H.12.1 Identify the function areas of a business
- H.12.2 Identify and explain a business organizational chart
- H.12.3 Become aware of career opportunities in business organization/ management, and understand the technical skills, knowledges, education levels, and attitudes needed
- H.BS.1 Analyze the pros and cons of different management decisions
- H.BS.2 Develop short-term strategic plans for a business
- H.BS.3 Describe how the organization provides for accountability through authority and responsibility
- H.BS.4 Measure and compare established employment standards
- H.BS.5 Recognize the role of labor and management unions
- H.BS.6 Understand the importance of employer/employee relations

Marketing (National Standards for Business Education)

- I. Recognize customer-oriented nature of marketing and analyze the impact of marketing activities on the individual, business, and society
- II. Analyze the characteristics, motivations, and behaviors of consumers
- III. Analyze the influence of external factors on marketing
- IV. Analyze the elements of the marketing mix, their interrelationships, and how they are used in the marketing process
- V. Analyze the role of marketing research in decision making
- VI. Describe the elements, design, and purposes of a marketing plan

Marketing (Wisconsin's Model Academic Standards – Business)

- F.12.7 Describe the market research process
- F.12.7 Describe the factors that influence a consumer's decision to buy
- F.12.8 Identify the elements of the promotional mix
- F.12.9 Identify the role of marketing in the United States economy
- F.12.10 Describe various methods of product distribution (logistics)
- F.BS.1 Describe and use a marketing plan
- F.BS.2 Perform market research
- F.BS.3 Test market a product/service
- F.BS.4 Analyze the life cycle of a product/service
- F.BS.5 Analyze the various factors in pricing for a product/service
- F.BS.6 Identify factors that influence the promotional mix of a product/service
- F.BS.7 Identify the steps of the selling process
- F.BS.8 Develop a distribution plan for a product/service

Example Activities – Management

1. Obtain a contract (lease, sales, employment...) from your place of employment and identify the elements of a contract including: offer, acceptance, genuine ascent, capacity, legality, and consideration (Business Law IBS.4, IBS.7, IBS.8, IBS.9)
2. Does the company you work for do business internationally? If so, plan a trip to a conference in a foreign country on behalf of your organization. If not, talk to your supervisor to plan for an expansion into a given country. The report should include:
 - Expense authorization and expense report.
 - Travel itinerary for your trip
 - Secure travel, lodging, transportation, food...
 - Obtain travel documents (passports, currency exchange rates...)
 - Compute currency
 - International protocol
 - Time Zones(Entrepreneurship EBS.2, EBS.9; International Business GBS.4, GBS.6, GBS.8, GBS.9, GBS.11, GBS.12; Information Technology BBS.5, BBS.12; Management HBS.1)
3. Prepare an Employee Handbook for your job that includes an organizational chart, company mission statement, your job description, products/materials utilized in your position, technology necessary to accomplish your tasks, training provided and necessary, competitors/subsidiaries of the company, Company policies (ie Internet acceptable use, Equity policy, phone policy, dress code, etc), relevant employment laws, and legal forms used in business transactions. (Entrepreneurship EBS.8, Management HBS.3, HBS.5; Business Law IBS.10)
4. Develop a marketing plan for a product/service for your business or for a non-profit organization. If international, look at the international business competitors. (Marketing FBS.1, FBS.2, FBS.3, FBS.4, FBS.5, FBS.6, FBS.7, FBS.8; Entrepreneurship EBS.2, EBS.3, EBS.4, EBS.9)

Section III – Workplace Skills

Workplace skills for the *Wisconsin Guide to Work-Based Learning Skill Standards – Business & Information Technology* are skills which may be observed and evaluated by a workplace mentor.

The purpose of the Workplace Skills Evaluation is to be used as a growth tool for the student. It is anticipated that the Workplace Skills Evaluation would be completed by the workplace mentor no less than quarterly. This will ensure consistent feedback for both the student and the teacher. It will allow the student opportunity for input and measurement of growth in demonstration of workplace skills. The form allows opportunity for workplace mentor comments as well as goals for improvement.

The culmination of the Workplace Skills Evaluation, in addition to student-teacher-mentor feedback, will provide the basis for the final assessment of the workplace skills on the Final Evaluation form. All areas must meet the workplace expectation of those skills for the student to certify in the workplace skills section.

Wisconsin Work-Based Learning Skill Standards – Business & Information Technology

Workplace Skills Evaluation

Student	School	School Year
Workplace Mentor	Workplace	
Date	Evaluation Period	
<input type="checkbox"/> Quarter 1 <input type="checkbox"/> Quarter 2 <input type="checkbox"/> Quarter 3 <input type="checkbox"/> Quarter 4		

Evaluation Scale – Please use the following scale when evaluating each workplace skill.

!	Creative, inventive, detailed, mature presence of skill
+	Detailed and consistent evidence of the skill
✓	Beginning of or some evidence of the skill
—	Little observation or no opportunity to observe skill

Work Ethic

		!	+	✓	—
1.	Exhibits responsible behavior relative to workplace environment				
2.	Demonstrates punctuality				
3.	Displays dependability				
4.	Demonstrates ability to work with others				
5.	Displays flexible behavior				
6.	Dresses appropriately for workplace				
7.	Illustrates pride in work				
8.	Applies workplace standards and guidelines to produce and ensure quality work				
9.	Shows initiative				
10.	Works to maximize personal productivity				
Comments:					

Workplace Communication

		!	+	✓	—
1.	Demonstrates effective oral communication skills				
2.	Demonstrates ability to receive and give constructive criticism				
3.	Uses correct grammar and spelling for workplace communications				
4.	Demonstrates appropriate nonverbal communications skills (customers and co-workers)				
5.	Provides quality customer service				
6.	Demonstrates appropriate telephone techniques				
7.	Demonstrates appropriate e-mail etiquette				
Comments:					

Workplace Technologies

		!	+	✓	—
1.	Selects and applies appropriate technology for a task				
2.	Utilizes technology tools to access and create information				
Comments:					

Workplace Relationships		!	+	✓	—
1.	Demonstrates appropriate social skills for the workplace				
2.	Displays appropriate listening skills				
3.	Projects a positive attitude				
4.	Demonstrates appropriate employer and employee interactions				
5.	Demonstrates appropriate employee and customer interactions				
6.	Functions as a productive member of team				
Comments:					

Workplace Diversity		!	+	✓	—
1.	Works effectively with a diverse workforce (age group, cultures, genders, etc.)				
2.	Demonstrates the skills necessary to function as a member of a diverse workforce (e.g., diplomacy, patience, willingness to compromise, and ability to listen)				
Comments:					

Workplace Safety & Regulations		!	+	✓	—
1.	Performs work in accordance with employee rights and responsibilities				
2.	Identifies types and sources of workplace hazards				
3.	Complies with workplace safety regulations				
Comments:					

Lifelong Learning		!	+	✓	—
1.	Demonstrates willingness to learn new skills				
2.	Demonstrates the ability to learn new skills				
3.	Analyzes own performance for improvement				
Comments:					

Goals for Improvement:

Workplace Mentor Signature	Date
Student Signature	Date

Appendices

Appendix A – Wisconsin’s Model Academic Standards for Business

*Mark an X next to each standard to indicate student exhibits knowledge and skills to meet achievement of that standard

X

Business Foundations – minimum 20 standards

Communication

A.BS.1	Research and write business-specific technical reports that incorporate graphic aids (see LA B.12.1, B.12.2, B.12.3, E.12.1)	
A.BS.2	Analyze and respond to complex business case studies	
A.BS.3	Edit business documents to improve content and effectiveness (see LA B.12.2)	
A.BS.4	Compose, edit, and produce executive summaries (see LA B.12.1, B.12.2, B.12.3)	
A.BS.5	Give a formal presentation using appropriate graphics, media, and support materials (see LA C.12.1, E.12.3)	
A.BS.6	Present point of view on a current business issue	
A.BS.7	Serve effectively as an interviewer or interviewee in public relations, civic, media, and community situations (see LA F.12.1)	
A.BS.8	Evaluate media and oral presentations analytically and critically (see LA C.12.3, E.12.4)	
A.BS.9	Preside at meetings	
A.BS.10	Use negotiation strategies to resolve a conflict	
A.BS.11	Demonstrate the ability to satisfy a customer’s request	
A.BS.12	Prepare and deliver a presentation for a specific business purpose	
A.BS.13	Participate in and evaluate mock interviews	
A.BS.14	Discuss the importance of verbal and nonverbal communications during an interview	

Computation* (National Standards, no Wisconsin Business Standards)

I.	Apply basic mathematical operations to solve problems	
II.	Solve problems involving whole numbers, decimals, fractions, percents, ratios, averages, and proportions	
III.	Use algebraic operations to solve problems	
IV.	Use common international standards of measurement when solving problems	
V.	Analyze and interpret data using common statistical procedures	
VI.	Use mathematical procedures to analyze and solve business problems	

Interpersonal and Leadership

J.BS.1	Practice appropriate interpersonal skills in a business setting	
J.BS.2	Plan and present short presentations individually or as a member of a team	
J.BS.3	Demonstrate an acceptance of different cultural beliefs and practices	
J.BS.4	Demonstrate successful listening techniques	
J.BS.5	Demonstrate professional behavior in the work environment	
J.BS.6	Participate as a member of a team in a business environment	
J.BS.7	Use appropriate etiquette when relating to business people of various cultures	
J.BS.8	Demonstrate effective consensus-building techniques in a group situation	
J.BS.9	Identify ways in which honesty and integrity of co-workers affect work performance	
J.BS.10	Lead a committee or preside at a meeting	
J.BS.11	Explain the different roles people assume when working in groups	

Appendix A – Wisconsin’s Model Academic Standards for Business

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X

Finance – minimum 10 standards

Financial Procedures

D.12.1	Describe the components of economic activity and illustrate how they interact with each other	
D.12.2	Describe the possible effects of the national debt on the level of economic activity in the long run (see SS D.8.6)	
D.12.3	Explain how consumer legislation may affect consumer product prices (see SS D.12.5)	
D.12.4	Demonstrate an understanding of current local, state, national, and international economic issues (see SS D.12.6, D.12.13)	
D.12.5	Describe the roles of business enterprises, consumers, and government in our mixed economy (see SS D.8.10, D.12.7, D.12.14)	
D.12.6	Explain how interest rates are determined by market forces and how they influence the amount of borrowing and saving by business investors, consumers, and government officials (see SS D.12.11)	
D.BS.1	Explain the basic characteristics of international trade including absolute and comparative advantage, barriers to free trade, exchange rate, and balance of trade	
D.BS.2	Analyze how income will be affected by factors such as supply and demand, location, level of education, type of industry, union or non-union membership, gender, ethnicity, skill levels, work ethics, worker productivity, and market value of what workers produce	
D.BS.3	Understand the necessity for choices and the role of the decision-making process for analyzing individual business and societal decisions	
D.BS.4	Compare and contrast the different types of economic systems (command, market, traditional, and mixed)	
D.BS.5	Explain the concepts of inflation, unemployment, and Gross Domestic Product and describe how they are measured	

Financial Procedures

C.12.1	Calculate simple interest on loans (see M D.12.3)	
C.12.2	Maintain and reconcile a checking account	
C.12.3	Prepare a budget of personal income and expenses	
C.12.4	Explain the use of credit cards, bank cards, debit cards, credit ratings, and loan applications	
C.12.5	Construct and read charts, tables, and graphs that summarize data from real world situations (see M F.12.2)	
C.12.6	Use calculators appropriately to aid computations and understanding (see M B.4.5)	
C.12.7	Contrast rental, lease, or purchase options of property	
C.12.8	Prepare a simple income tax form	
C.12.9	Contrast short- and long-term investment options	
C.BS.1	Identify, prepare, and analyze financial statements	
C.BS.2	Calculate loan payments with different interest rates (see M D.12.3)	
C.BS.3	Determine cash flow for a business	
C.BS.4	Compare budget figures to actual costs	
C.BS.5	Prepare and maintain payroll records	
C.BS.6	Determine manufacturing costs	
C.BS.7	Use technology to maintain, manipulate, and report financial information	

Appendix A – Wisconsin’s Model Academic Standards for Business

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X

Information Technology – minimum 10 standards

Information Technology

B.12.1	Access, navigate, and use online services	
B.12.4	Import text and graphics from other software programs	
B.12.6	Restart and recover from system failure and virus infection as necessary	
B.12.12	Analyze spreadsheet data	
B.12.13	Use desktop publishing software to create documents (see LA E.8.3)	
B.12.18	Send and receive faxes	
B.12.19	Use electronic mail	
B.12.20	Send and respond to voice messages	
B.12.21	Sort and file documents according to established procedures	
B.BS.1	Diagnose and solve problems related to the operation of computer equipment	
B.BS.2	Apply special features of software packages such as galleries, templates, macros, etc.	
B.BS.3	Describe how information systems have changed the workplace	
B.BS.4	Explain how information systems have contributed to worker productivity	
B.BS.5	Use data to create information to solve business problems	
B.BS.6	Use desktop publishing software to design, create, and produce a variety of publications (see LA E.8.3)	
B.BS.7	Import data, graphics, and scanned images using desktop publishing software	
B.BS.8	Use multimedia software to design, create, and produce a variety of presentations (see LA E.8.3)	
B.BS.9	Design and create a web page	
B.BS.10	Evaluate application software products in terms of their features	
B.BS.11	Customize application software	
B.BS.12	Generate complex, multipart documents	
B.BS.13	Use operating system commands	
B.BS.14	Generate business forms	
B.BS.15	Generate newsletters and brochures (see LA E.8.3)	
B.BS.16	Create documents by merging information	
B.BS.17	Establish and maintain a records management system	

Appendix A – Wisconsin’s Model Academic Standards for Business

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X

Management – minimum 15 standards

Business Law (Principles of Law)

I.12.1	Interpret and apply legal principles to business and personal situations	
I.12.2	Differentiate and contrast between felonies and misdemeanors and their penalties	
I.12.3	Understand rights and responsibilities when leasing property	
I.12.4	Identify laws governing credit and credit reporting	
I.12.5	Demonstrate an understanding of legal forms used in business transactions	
I.12.6	Understand laws that govern personal investments and estates	
I.12.7	Identify agencies protecting consumer rights	
I.12.8	Become aware of career opportunities in law-related areas, and understand the technical skills, knowledges, education levels, and skills needed	
I.BS.1	Describe sources of laws and their effect on individuals and society (see SS C.8.3)	
I.BS.2	Identify court systems and procedures (see SS C.8.4)	
I.BS.3	Analyze laws governing starting and maintaining a business	
I.BS.4	List the elements of a business contract, and identify and explain the various types of contracts	
I.BS.5	Demonstrate an understanding of the legislative process, and exhibit an awareness of legislation affecting business	
I.BS.6	Compare and contrast differences in ethical and legal systems from state to state and nation to nation	
I.BS.7	Explain contractual rights and responsibilities	
I.BS.8	Discuss consumer protection legislation	
I.BS.9	Identify contractual capacity	
I.BS.10	Discuss the effects of law on employment relations	

Entrepreneurship

E.BS.1	Research the unique contributions of entrepreneurs in the American economy	
E.BS.2	Given a business dilemma, identify the problem and analyze possible solutions	
E.BS.3	Design a business plan for a specific business	
E.BS.4	Establish a means for building and maintaining customer loyalty	
E.BS.5	Identify impact of outside sources such as labor unions, trade organizations, and competition when establishing a small business	
E.BS.6	Prepare financial statements for a planned business	
E.BS.7	Evaluate the financial condition of a business based on its financial records	
E.BS.8	Diagram the organizational structure of a planned business	
E.BS.9	Describe practices associated with cultural diversity that would impact a business moving from the national to the international marketplace	
E.BS.10	Develop a business plan for a specific business based on the concepts of successful entrepreneurship, and defend the plan to an investor	