BUSINESS/
INFORMATION SYSTEMS
BUSINESS/INFORMATION SYSTEMS – Core

This section provides teachers with an organizational tool that connects the Career Development and Occupational Studies Learning Standards (CDOS) 3B corresponding performance indicators. The goal of this Scope and Sequence is to provide a user-friendly guide that links CDOS with other content areas. The following should provide educators with a framework for lesson plan development.

<table>
<thead>
<tr>
<th>Standard 3B: Career Majors</th>
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<tbody>
<tr>
<td>Students who choose a career major will acquire the career-specific technical knowledge/skills necessary to progress toward gainful employment, career advancement, and success in postsecondary programs.</td>
</tr>
</tbody>
</table>

Relationship to Other Content and Skill Areas

**Performance Indicator 1:** Students apply knowledge/skills acquired in other content and skill areas to the business and information systems environment.

- English Language Arts related to the business and information systems environment.
  - Reading
  - Writing
  - Speaking and basic presentation skills
  - Listening

- Mathematics related to the business and information systems environment.
  - Graphic interpretation
  - Forecasting
  - Statistical analysis
  - Ratios
  - Percentages
  - Algebra – spreadsheet function use
  - Formula construction
  - Calculations

- Foundation skills related to the business and information systems environment.
  - Problem solving
  - Critical thinking
  - Decision making
  - Research
  - Organization and management
  - Planning
  - Self-management
  - Teamwork
  - Communication
  - Technology and information management

**Essential Questions**

What other content and skill areas do students need in order to successfully enter the business/multinational/information/technologically-based environment?
Computer information systems as related to the business and information systems environment

- Prepare, maintain, interpret information
- Analyze information
- Transmit and distribute information
- Demonstrate acceptable basic technology-related skills
Standard 3B: Career Majors

Students who choose a career major will acquire the career-specific technical knowledge/skills necessary to progress toward gainful employment, career advancement, and success in postsecondary programs.

I. Basic Business Understanding

Performance Indicator 1: Students demonstrate an understanding of business, marketing, and multinational economic concepts; perform business-related mathematical computations; and analyze/interpret business-related numerical information.

I. Business Concepts/Characteristics:
   A. Nature of business
      1. trends (e.g., e-commerce)
      2. influential factors
         a. Social
         b. Political,
         c. Economic,
         d. Technological,
         e. Global
   3. Forms of Business Organization
      a. Proprietorship
      b. Partnership
      c. Corporation
      d. Specialized
         i. profit and nonprofit
         e. characteristics of each organization
         i. formation steps
         ii. advantages and disadvantages
   B. Social Issues:
      1. Population/work force
      2. Environmental
      3. Social responsibility
   C. Legal Issues:
      1. Economic regulations
      2. Business protections (e.g., restrictive covenant, copyright, trademark)
      3. Protection of public interest (e.g., OSHA, ADA, EEOC)
      4. Regulations (e.g., global, national, state, local)
      5. Business taxation
      6. Labor
   D. Ethical Issues and Dilemmas:
      1. Confidentiality (e.g., trade secrets, privacy)
      2. Environmental impact (e.g., pollution)
      3. Global, national, state, and local
      4. Social responsibilities

<table>
<thead>
<tr>
<th>Essential Questions</th>
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<tbody>
<tr>
<td>What are the social, legal, and ethical issues and characteristics that confront all forms of business ownership?</td>
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<tr>
<td>What is the role of microeconomics and macroeconomics in the global financial and economic decision-making process?</td>
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<tr>
<td>How do communication, management, and marketing structures interact with and relate to the cultural, social, and economic aspects of multinational/global business?</td>
</tr>
<tr>
<td>What are the marketing functions, systems, and characteristics that address the decisions of the marketing mix (product, price, promotion, and place)?</td>
</tr>
<tr>
<td>What are the aspects of entrepreneurship as a form of business?</td>
</tr>
<tr>
<td>How are mathematics skills used to accomplish business-related applications?</td>
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</tbody>
</table>
II. Economics:
   A. Making Economic Decisions
      1. The Economic Way of Thinking
      2. Making Individual Decisions
      3. Making Group Decisions
      4. Private Sector Decisions
      5. Public Sectors Decisions
   B. The Microeconomic Perspective
      1. Demand: Achieving Consumer Satisfaction
      2. Supply: Producing Goods and Services
      3. Demand, Supply, and Prices
      4. Business Firms in the Economy
      5. Perfect Competition and Monopoly
      6. Monopolistic Competition
      7. Improving the Market Economy
      8. The Labor Market and Determining Personal Income
   C. The Macroeconomic Perspective
      1. Measuring Aggregate Economic Activity
      2. The Distribution of Income
      3. Unemployment
      4. Inflation
      5. Money, the Federal Reserve System and Banking
      6. Monetary Policy
      7. Taxes
      8. Fiscal policy
      9. Economic Growth
   D. Personal Finance and Investment
   E. World Economy

III. Multinational/Global Business:
   A. Role of Multinational Business:
      1. Import
      2. Export
   B. Multicultural Communications
      1. Cultural diversity (e.g., different languages)
      2. Communications Strategies
         a. nonverbal
         b. oral and written
         c. technical
      3. Environment:
         a. social
         b. political
         c. legal
      4. Multinational/Global Business Management:
         a. organizational structures
         b. human resources
         c. entrepreneurial opportunities
         d. conversion
            i. monetary
5. Multinational Marketing
   a. language
   b. customs/traditions
   c. legal aspects
   e. political
   f. technology
      i. time factor
      ii. monetary factors

IV. Marketing:
   A. Basics (e.g., functions, mix, concept, utility)
   B. Product Management (planning, development, product, lifecycle)
   C. External Factors:
      1. Governmental regulations
      2. Economic environment
      3. Cultural differences
      4. Technology
      5. Special interest groups
      6. Competition
   D. Financial Management:
      1. Objectives of pricing
      2. Calculating price
      3. Purchasing process
      4. Forecasting
   E. Distribution Systems:
      1. Channels of distribution
      2. Intermediaries
      3. Inventory control
   F. Promotion/Advertising/Public Relations:
      1. Media
      2. Budgets
      3. Technology
      4. Forms of sales promotion
      5. Promotion programs
      6. Public relations plan
      7. Personal selling
      8. Sales approaches
      9. Functions of sales personnel
   G. Market Research:
      1. Purposes
      2. Data collection, sampling, and analysis
   H. Market Types/Characteristics:
      1. Buying motives
      2. Market segmentation
      3. Market positioning for competitive edge
   I. Marketing Plan:
      1. Development
      2. Strategic and tactical planning
   J. Trends and Innovations in Marketing:
1. Societal changes
2. Technological innovation

K. Ethics
   1. Code of behavior
   2. Truth in advertising, selling, and packaging

V. Entrepreneurship:
   A. Characteristics of the Entrepreneur
   B. Advantages and Disadvantages
   C. Business Plan
   D. Financing (e.g., raising capital)
   E. Opportunities
   F. Legal Issues (see IC)
   G. Organizational Structures (see IA3)
   H. Marketing (see IV)
   I. Economics (see III)
   J. Finance/Accounting
   K. Global Markets

VI. Business-related Mathematical Applications:
   A. Computation (e.g., accounting, income taxes, financial records, ratios and percentages, depreciation)
   B. Interpretation (e.g., tables, charts, and graphs, financial reports)
   C. Analyzing (e.g., amortizations, real vs. nominal, statistics, economic indicators)
   D. Forecasting (e.g., stock markets, sales, inventory, earnings)
2. Business-Related Technology

Performance Indicator 1: Students select, apply, and troubleshoot hardware and software used in the processing of business transactions.

I. Keyboarding
   A. Features of various keyboards (e.g., 10-key pad, function keys)
   B. Touch keyboarding skills at acceptable speed and accuracy Levels (e.g., 30 net words per minute)
   C. Enter and manipulate numeric data using the touch method on a 10-key pad
   D. Efficient manipulation of pointing device (e.g., mouse, trackball, joystick)
   E. Experience with voice recognition software as an input device

II. Using Software
   A. Word processing software to create, edit, and print reports, tables, correspondence and other documents
   B. Spreadsheet software to design, create, manipulate, update and/or print data and charts
   C. Database software to plan, create, manipulate, and print reports and other documents
   D. Presentation software and multimedia (e.g., design, create, import data, graphics, scanned images, photos, sound, audio [CD or downloaded music] video)
   E. Edit, format, sequence, and produce a variety of presentations and related materials (e.g., notes page, handouts, outline)
   F. Design and develop a website using appropriate software
      1. Enter and format text
      2. Create and insert hyperlinks
      3. Incorporate clip art, images, links

Essential Questions

How will students demonstrate the selection and utilization of appropriate technology to resolve business-related questions and challenges?
III. Identifying and Selecting Software:
   A. Application and other software to perform business tasks and solve problems
      1. Determine what software package will fulfill task as related to business as well as personal use
      2. Establish standards for business use
      3. Evaluate success of software solution
   B. Evaluation of Software Programs
      1. Appropriateness (e.g., cost, licensing, utility, platform)
   C. Awareness of emerging application software

IV. Troubleshooting:
   A. Install, customize, upgrade, and maintain application software
   B. Use reference materials to diagnose and solve software/hardware problems:
      1. On-line help
      2. Bulletin boards
      3. Tutorials
      4. Manuals

V. Understanding Hardware (e.g., fax, scanners, copiers, digital cameras, cell phone, new and emerging technologies):
   A. Purpose and operation of hardware components
   B. Hardware components required, nice to have (level of choice), or minimally appropriate for specific tasks or multitude of tasks (minimum vs. maximum, single task vs. multiple tasks)
   C. Various configurations of hardware components
   D. Ergonomic principles in configuration of workstations
   E. Emerging hardware technology
Standard 3B: Career Majors

Students who choose a career major will acquire the career-specific technical knowledge/skills necessary to progress toward gainful employment, career advancement, and success in postsecondary programs.

3. Information Management/Communications

Performance Indicator 1: Students prepare, maintain, interpret/analyze, and transmit/distribute information in a variety of formats while demonstrating the oral, nonverbal, and written communication skills essential for working in today’s international service-information-technological-based economy.

I. Written Communication:
A. Prepare business letters, memoranda, and reports using correct style, format, and content
B. Compose correspondence appropriate for specific audiences
C. Utilize a variety of references and resources
D. Write and present industry-specific reports incorporating technical writing skills
E. Proofread documents for correct grammar, spelling, and punctuation
F. Research and analyze business-related reports

II. Oral Communication:
A. Plan, prepare, present, and evaluate informal/formal oral communication based on purpose and audience
B. Utilize visual aids and handouts, voice, and body language to effectively complement a message
C. Ask questions to solicit and clarify information (e.g., interview)
D. Express message effectively

III. Listening Communication:
A. Determine when listening whether you must take notes, ask questions, or participate in discussion
B. Evaluate what you hear based on the speaker, the speaker’s purpose and the message
C. Interpret nonverbal clues in the speaker’s message
D. Follow oral directions

IV. Reading Communication:
A. Evaluate what you read based on the writer, the writer’s purpose and the message
B. Follow written directions
C. Analyze and interpret printed and electronic correspondence

Essential Questions
How are written, oral, listening, reading, and technology skills essential to effective communication in the business environment?
1. Internet
   a. White papers
D. Skim, scan, and read for detail based on purpose
E. Read and comprehend technical writing (e.g., manuals, reports, online documents)

V. Telecommunication Applications
A. Voice communication
   1. Telephone
   2. Voice messaging
   3. Computer to telephone connections
   4. Personal information systems to computer
B. Written communication
   1. E-mail
   2. Attachments
C. Fax communication
D. Video conferencing
E. Research
   1. Internet
   2. Intranet
E. Commerce
   1. E-commerce
   2. online commercial research
F. Technical Needs
   1. LANS
   2. WAN
   3. service providers
4. Business Systems

Performance Indicator 1: Students demonstrate an understanding of the interrelatedness of business, social, and economic systems/sub-systems.

I. Economic Systems (see II)

Social Systems
A. Legal Systems
   1. court systems
   2. business law (e.g., contracts, employment, consumer, corporate)
   3. ethics and the law

III. Financial/Administrative Systems:
A. Financial systems:
   1. accounting:
   2. credit and collections plans,
   3. insurance
   4. monetary
B. Administrative/Management
   1. policies and procedures
   2. records/data management
   3. human resources/personnel
   4. inventory

IV. Information Systems
A. personnel
B. equipment
C. financial records
D. inventory
E. communication (e.g., e-mail)

V. Production/Manufacturing Systems
A. Planning
B. Producing
   1. Quality assurance
   2. National or state standards, safety, environmental
C. Marketing

Essential Questions
How are systems used to organize and operate a business?
Standard 3B: Career Majors

Students who choose a career major will acquire the career-specific technical knowledge/skills necessary to progress toward gainful employment, career advancement, and success in postsecondary programs.

5. Resource Management

Performance Indicator 1: Students identify, organize, plan, and allocate resources (e.g., financial, materials/facilities, human, time) in demonstrating the ability to manage their lives as learners, contributing family members, globally competitive workers, and self-sufficient individuals.

I. Business Organization Management
   A. Organizational Structure
   B. Factors of Production
      1. Land
      2. Labor
      3. Capital
      4. Time

II. Human resources management:
   A. Planning
   B. Recruiting and selecting personnel
   C. Compensation
      1. Salaries
      2. Incentives
      3. Employee benefits
   D. Training and development
   E. Performance appraisal
      1. Promotion
      2. Transfer
      3. Termination

III. Personal resource management: (see I, II)

Essential Questions

What is needed for management of personal resources, human resources, and management of a business organization?
6. Interpersonal Dynamics

Performance Indicator 1: Students exhibit interpersonal skills essential for success in the multinational business world, demonstrate basic leadership abilities/skills, and function effectively as members of a work group or team.

I. Skills for Success in a Multinational Business World:
   A. Personal qualities related to employability
   B. Team member skills needed to accomplish a task
   C. Interpersonal skills for working with and for others
      1. Give/receive constructive criticism
      2. Effective time management

II. Leadership Abilities and Skills:
   A. Styles
   B. Traits of Leaders (e.g., ability to motivate, delegate)
   C. Skills (e.g., plan, organize)

III. Function Effectively as Members of a Work Group/Team:
   A. Sensitivity (e.g., cultural diversity)
   B. Apply principles of group dynamics and participation in team activities
   C. Communications
      1. Listening skills
      2. Appropriate response
      3. Feedback
   D. Understand the chain of command/purpose of authority
   E. Understand corporate culture

Essential Questions

What are the essential leadership, team, and personal skills needed for success in a multinational/global business world?
## BUSINESS/INFORMATION SYSTEMS SAMPLE ACTIVITY OVERVIEW

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<td>Getting the News</td>
<td>54</td>
<td>CDOS 3B:3; 2:3; 3A:1,5; ELA; SS; Arts</td>
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CDOS = Career Development and Occupational Studies Standards
ELA = English Language Arts Standards
LOtE = Languages Other than English Standards
MST = Mathematics, Science, and Technology Standards
H/PE/FCS = Health, Physical Education, Family and Consumer Sciences Standards
SS = Social Studies
Arts = The Arts
**Title of Activity: Toy Makers**

**Objective**
Students will research entrepreneurial skills used in creating and producing toys for preschoolers.

**Description of Activity**
Present the following scenario to students:
- You and your friends have recently been helping out at a local day care center for preschoolers. With all the new toys the preschoolers have available to them, none of them adequately teach the children about colors, numbers, or shapes. You decide to create a toy that will fill this “niche.”
- In teams, create a toy appropriate for a preschooler that teaches one of the following:
  - Color
  - Sizes and/or shapes
  - Numbers.
- Materials used for the toys must meet the following requirements:
  - Must be made of recyclable materials.
  - Must have no small pieces that can be ingested by a young child.
  - Must be safe.
- The toy must be a hands-on “action” toy and the preschooler must participate in the use of the toy.
-Student teams present a short presentation summarizing the process the team used to develop the toy. The following points must be included in the summary:
  - Explain the purpose of the toy.
  - Demonstrate how the toy is used.
  - Describe the role each team member played in creating the project.
  - Describe the entrepreneurial skills used in creating and producing the toy.
  - Explain strategies used when reaching a decision
  - Explain why the alternative choices were discarded.

**Comments/Modifications**
- Host a marketing fair.

**Assessment/Evaluation**
- Scores for team members may be based on a point system. (see attached)

**Source/Credit**
Submitted by JoAnn Bagnoli, Fort Plain High School
THE TOY MAKERS
TEAM GRADE

TEAM MEMBERS:

<table>
<thead>
<tr>
<th>PERFORMANCE FACTORS</th>
<th>10-9 points</th>
<th>8-6 points</th>
<th>5-3 points</th>
<th>2-0 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toy was age appropriate</td>
<td></td>
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<tr>
<td>Purpose of the toy matched its use</td>
<td></td>
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<tr>
<td>Materials used met criteria</td>
<td></td>
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<tr>
<td>Toy was designed as a hands on activity</td>
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<tr>
<td>Presentation covered all points listed</td>
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<td></td>
<td></td>
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<tr>
<td>Team was prepared for presentation</td>
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</tbody>
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SCORE

TOTAL POINTS _____ out of 60 total
TEAM GRADE ________________
## SAMPLE ACTIVITY

### Title of Activity: Mind Your Own Business

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<td>10</td>
<td>11</td>
<td>12</td>
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</table>

**Estimated Time:** 1 – 1-1/2 days

### OBJECTIVE
Students will create and illustrate the “perfect” place to work.

### DESCRIPTION OF ACTIVITY
Present the following scenario to students:
- As a group, you create and illustrate the “perfect” place to work. You may decide to manufacture a product, provide a service, manage information, etc.
- You may decide to help people in need, build bridges, sell “great ideas”, etc.
- You may decide to do a combination of things (products and services) in order for each member of your group to be happy at work.
- You decide which job each of you will take within this business. They need to include a leader or manager of the business or someone that is “in charge.” What things will each of you be responsible for to make the workplace or business successful?
- You may also decide what kind of work environment they want – physical appearance; setting; work schedule; relationship between yourselves (supervisors, middle management).
- As in many workplaces, you are short-staffed. There is more work than your team can handle! You may get more staff, but there is no guarantee. How would you divide your current work if you lost a member of your team to another workplace? How would you recruit new members to your workplace?

### MATERIALS/RESOURCES
- Large pieces of construction paper
- Markers
- Crayons

### COMMENTS/MODIFICATIONS
Allow the groups to develop and illustrate their workplaces using pictures, words and symbols. About half-way through the process, advice the leader or manager of each group that their workplace has fallen on “hard” times and they must dismiss one member of their work team. The leader or manager of each group must decide the appropriate method of completing this task and announcing it to their group. Allow groups to debrief by writing a narrative of the process used and their reaction to this process (see attached). Members of the class that were “laid off” must decide what they will do: form a new workplace, try to join another workplace by developing a new position within that workplace, etc.

### SOURCE/CREDIT
Taken in part from *Out of Bounds* developed by NYS Career Options Institute and modified by Kathie DeKalb, Fort Plain High School

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### COMMENCEMENT CDOS STANDARDS

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<td>3. Information Management/Communication</td>
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<td>5. Resource Management</td>
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<td>6. Interpersonal Dynamics</td>
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**Career Development (1)**

1. Complete development of career plan
2. Apply decision-making skills in selection of a career option
3. Analyze skills and abilities in a career option

**Integrated Learning (2)**

1. Demonstrate integration and application
2. Use academic knowledge and skills
3. Research, interpret, analyze, and evaluate information

### Universal Foundation Skills (3A)

1. Basic Skills
2. Thinking Skills
3. Personal Qualities
4. Interpersonal Skills
5. Technology
6. Managing Information
7. Managing Resources
8. Systems

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**LEARNING STANDARDS AREAS**

- English Language Arts
- Languages Other than English
- Mathematics, Science, and Technology
- Health, Physical Education, Family and Consumer Sciences
- Social Studies
- The Arts
Mind Your Own Business
Sample Debrief

1. How did you choose your group leader/manager?

2. What leadership traits does this person have to make them effective as the person “in charge”?

3. What changes did you notice in the workplace you participated in as the activity progressed?

4. What reactions did you have to be laid-off from your position?

5. What reactions did you have to a new person coming into your workplace and/or losing a team member?

6. How did the changes in personnel influence your group’s interaction and/or progress?

7. What reactions did you have to the changes in your original workplace at the end of the activity?
## Title of Activity: Creating a Fantasy Team

### OBJECTIVE
Students will determine who is the target market for a fantasy sports team. They will research a geographic area to support the name and location for their fantasy sports team.

### DESCRIPTION OF ACTIVITY
See attached description.

### MATERIALS/RESOURCES
- Website: [www.fantasysports.com](http://www.fantasysports.com)

### COMMENTS/MODIFICATIONS

### ASSESSMENT/EVALUATION
Follow a grading criteria (see attached) when evaluating the teams’ project.

### SOURCE/CREDIT
Submitted by Ellen Potere, Sayville High School.

### COMMENCEMENT CDOS STANDARDS

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<th>INTEGRATED LEARNING (2)</th>
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</tr>
<tr>
<td>2. Use academic knowledge and skills</td>
</tr>
<tr>
<td>3. Research, interpret, analyze, and evaluate information</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UNIVERSAL FOUNDATION SKILLS (3A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Basic Skills</td>
</tr>
<tr>
<td>2. Thinking Skills</td>
</tr>
<tr>
<td>3. Personal Qualities</td>
</tr>
<tr>
<td>4. Interpersonal Skills</td>
</tr>
<tr>
<td>5. Technology</td>
</tr>
<tr>
<td>6. Managing Information</td>
</tr>
<tr>
<td>7. Managing Resources</td>
</tr>
<tr>
<td>8. Systems</td>
</tr>
</tbody>
</table>

### LEARNING STANDARDS AREAS

<table>
<thead>
<tr>
<th>ENGLISH LANGUAGE ARTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Languages Other than English</td>
</tr>
<tr>
<td>2. Mathematics, Science, and Technology</td>
</tr>
<tr>
<td>3. Health, Physical Education, Family and Consumer Sciences</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SOCIAL STUDIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Social Studies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>THE ARTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The Arts</td>
</tr>
</tbody>
</table>
CREATING A FANTASY TEAM
PART ONE: TARGETING YOUR MARKET

Present the following scenario to students:

- With your group, determine who is your target market for your fantasy team. Are you targeting families, upper-middle class fans, corporations, etc.? When targeting your market, please keep in mind the following factors:
  - The specific group of people you want to reach.
  - Any smaller market segments (geographics, demographics, psychographics).

- You must submit a written statement that describes your main target and smaller market segments. You need to incorporate more than (1) market segment. Your group will receive a grade on Part One based on the following criteria:
  - Time on task
  - Completion of assignment
  - Seriousness
  - Format of written statement (includes sentence structure, grammar, spelling)
  - Timeliness

PART TWO: GIVING YOUR TEAM IDENTITY!

Choose a franchise name, location and team colors. Is the name you selected compatible with the city you selected?

- Be prepared to rationalize why you chose the location and the team name that you did. Remember: this name will become your team’s identity; choose it wisely! Some of the things you may want to consider in the decision to locate a team are issues such as size of city, size of surrounding metropolitan area, size of TV market, other competing professional sports teams and accessibility to corporate sponsors. Can you think of others?

- Give a written description of each of these items. You might want to divide these up for research and then reach a consensus on the selected choices. When submitting this assignment, I need to see a picture of the mascot. CREATIVITY COUNTS HERE! You will be graded on the following criteria:
  - Completion of assignment
  - Seriousness
  - Format of written statement (sentence structure, grammar, spelling)
  - Timeliness
  - Creativity
  - Time on task

You may use the following site for research on a geographic area to support your team name and location. Example:

Sayville’s homepage (http://vista1.sayville.k12.ny.us)
Select teacher assigned sites
Select general page of related sites
City maps and travel
Maps and directions
PART THREE: CREATE A TEAM LOGO

Your team logo will be the symbol that represents your team in and on everything that you do in addition to everything that you hand in to your teacher. The logo should represent the team’s spirit and message. It should be easily recognizable and make a strong statement. Use information on advertising from various sources to research and create your logo.

- Give a written explanation and a final copy of your logo.
- You will be graded on the same criteria as in Part Two.
## CREATING A FANTASY TEAM

### GRADING CRITERIA

#### GROUP EVALUATION

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>100</th>
<th>90</th>
<th>80</th>
<th>70</th>
<th>60</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Brainstorming (Time on Task)</strong></td>
<td>Share and apply ideas and work from bell to bell all of the time</td>
<td>Share and apply ideas and ready to work with rare exception</td>
<td>Share and apply ideas most of the time</td>
<td>Easily distracted and had difficulty remaining on task</td>
<td>Unable to stay on task and rarely ready to work</td>
</tr>
<tr>
<td><strong>Written Statement (Completeness)</strong></td>
<td>Answer all questions effectively adding additional details</td>
<td>Answer all questions effectively</td>
<td>Answer most of the questions effectively</td>
<td>Answer questions but some value and not well thought out</td>
<td>Did not answer most questions and many not well thought out</td>
</tr>
<tr>
<td><strong>Drawing of Logo</strong></td>
<td>Design was complete w/details and color (prototype supplied)</td>
<td>Design was complete w/details and color</td>
<td>Design was complete with most details and color</td>
<td>Design was missing an essential element</td>
<td>Design was missing more than one essential element</td>
</tr>
<tr>
<td><strong>Timeliness</strong></td>
<td>Complete project ahead of schedule</td>
<td>Complete project on date required</td>
<td>Complete project with one detail submitted past deadline</td>
<td>Complete project with more than one detail past deadline</td>
<td>Project submitted beyond a reasonable length of time</td>
</tr>
<tr>
<td><strong>Seriousness</strong></td>
<td>Complete assignment w/serious intent all of the time</td>
<td>Complete assignment w/serious intent most of the time</td>
<td>Complete assignment w/serious intent some of the time</td>
<td>Most of the time did not consider the seriousness of the assignment</td>
<td>Rarely considered the seriousness of assignment</td>
</tr>
</tbody>
</table>

Business/Information Systems
Title of Activity: Marketing Maneuvers

<table>
<thead>
<tr>
<th>GRADE</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
</table>

Estimated Time: 4-5 days

OBJECTIVE
Students will be introduced to marketing maneuvers including the way to package, promote, and deliver a product.

DESCRIPTION OF ACTIVITY
Present the following scenario to students:

- You and your team are employed with an advertising firm. Your boss has asked you and your team to create a commercial for a product or service. The commercial must meet the following criteria:
  - The commercial must be set in any time period, other than the 1990’s, and must reflect some aspect of that culture.
  - The product or service must be an original product or service that resolves a problem.
  - The commercial must “target” a particular market (i.e., small children, adolescents, sports enthusiasts, music lovers, etc.).
  - The commercial must be one of the following:
    - A TV slot (lasting no more than one minute)
    - A radio campaign lasting at least one minute but no more than two minutes
    - A magazine advertisement

Summarize the project:
- Explain the process used to reach a final decision on your commercial.
- State your target market.
- Describe the role each team member played in constructing the commercial.

COMMENTS/MODIFICATIONS
Marketing can be described as follows:
Marketing is an art. The way you package, promote and deliver your product, your service or even yourself creates a lasting impression. Your choices can either entice the consumer or send her running off – no matter how great you or your product has proven itself to be.

Successful marketing skills involve creativity, thoughtfulness and the ability to predict consumer needs and/or wants. Sometimes you may have to build a market in order to convince consumers of his need or want for a product.

ASSESSMENT/EVALUATION
Scores for team members may be based on a point system. (see attached)

SOURCE/REDIT
Submitted by JoAnn Bagnoli, Fort Plain High School, 1999.

COMMENCEMENT CDOS STANDARDS

<table>
<thead>
<tr>
<th>Business/Information Systems (3B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Basic Business Understanding</td>
</tr>
<tr>
<td>2. Business-Related Technology</td>
</tr>
<tr>
<td>3. Information Management/Communication</td>
</tr>
<tr>
<td>4. Business Systems</td>
</tr>
<tr>
<td>5. Resource Management</td>
</tr>
<tr>
<td>6. Interpersonal Dynamics</td>
</tr>
</tbody>
</table>

Career Development (1)

| 1. Complete development of career plan |
| 2. Apply decision-making skills in selection of a career option |
| 3. Analyze skills and abilities in a career option |

Integrated Learning (2)

| 1. Demonstrate integration and application |
| 2. Use academic knowledge and skills |
| 3. Research, interpret, analyze, and evaluate information |

Universal Foundation Skills (3A)

| 1. Basic Skills |
| 2. Thinking Skills |
| 3. Personal Qualities |
| 4. Interpersonal Skills |
| 5. Technology |
| 6. Managing Information |
| 7. Managing Resources |
| 8. Systems |

LEARNING STANDARDS AREAS

| English Language Arts |
| Languages Other than English |
| Mathematics, Science, and Technology |
| Health, Physical Education, Family and Consumer Sciences |
| Social Studies |
| The Arts |
MARKETING MANEUVERS

TEAM GRADE

TEAM MEMBERS:

<table>
<thead>
<tr>
<th>PERFORMANCE FACTORS</th>
<th>10-9 points</th>
<th>8-6 points</th>
<th>5-3 points</th>
<th>2-0 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial accurately depicted a time period/culture outside the 90’s</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choice of product/service was original</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target market was identified</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial accurately directed to target market</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial displayed originality and creativity</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>The purpose of the commercial was clearly and well organized</td>
<td></td>
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</tr>
</tbody>
</table>

SCORE

TOTAL POINTS _____ out of 60 total

TEAM GRADE ______________
SAMPLE ACTIVITY

Business/Information Systems

Title of Activity: Moving Out

<table>
<thead>
<tr>
<th>GRADE</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
</table>

Estimated Time: 3-5 days

OBJECTIVE
Students will calculate and consider what it takes to move out.

DESCRIPTION OF ACTIVITY
Present the following scenario to students:

At the high school level, most students have one purpose in life . . . they must move out! Here is a chance to see what moving out is all about.

- Make a list of 20 things you will need to live on your own. Calculate the cost of each item.
- With the help of the local newspaper, look for a job to help fund your independence. Remember you have to select a job you are qualified for.
- With the help of the local newspaper, look for an apartment. Estimate the cost of rent and utilities per month.
- Prepare a monthly budget based on your salary and expenses.
- Create a grocery list and a menu for one day. Using the local newspaper, estimate the cost of eating for one day, one month, and one year.
- Write a reflection paper based on your findings. You may find out school is not such a bad place after all!

MATERIALS/RESOURCES

- Local newspapers
- “20 Things You Will Need to Live on Your Own” form (see attached)
- “Rent and Utilities” form (see attached)
- “Monthly Budget” form (see attached)
- “Grocery List and Menu” form (see attached)

COMMENTS/MODIFICATIONS

LEARNING STANDARDS AREAS

English Language Arts
Languages Other than English
Mathematics, Science, and Technology
Health, Physical Education, Family and Consumer Sciences
Social Studies
The Arts

ASSESSMENT/EVALUATION

SOURCE/CREDIT
Submitted by Business Department, Burnt Hills-Ballston Lake High School, 1999.
Name ________________________

**20 THINGS YOU WILL NEED TO LIVE ON YOUR OWN**

<table>
<thead>
<tr>
<th>ITEM</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
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<td>3.</td>
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<td>9.</td>
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<td>12.</td>
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<td>14.</td>
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<td>16.</td>
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<td>17.</td>
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<td>18.</td>
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<tr>
<td>19.</td>
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<tr>
<td>20.</td>
<td></td>
</tr>
</tbody>
</table>

Source: Business Department, Burnt Hills-Ballston Lake High School, 1999.
Name ________________________

RENT AND UTILITIES

COST (per month)

Rent:

Location of the apartment:

Utilities (list each utility):

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.
Name ______________________

MONTHLY BUDGET

<table>
<thead>
<tr>
<th>INCOME</th>
<th>EXPENSES</th>
</tr>
</thead>
</table>

Source: Business Department, Burnt Hills-Ballston Lake High School, 1999.
GROCERY LIST AND MENU

GROCERY LIST: (use back of sheet if you have additional items).

1. 11. 21.
2. 12. 22.
3. 13. 23.
5. 15. 25.
7. 17. 27.
8. 18. 28.
9. 19. 29.
10. 20. 30.

MENU FOR ONE DAY:

Breakfast –

Lunch –

Dinner –

COST OF EATING:

One Day =

One Month =

One Year =

Source: Business Department, Burnt Hills-Ballston Lake High School, 1999.
Objective
Students will research entrepreneurs from the past. They will compare characteristics of entrepreneurs during the pre-World War II era with entrepreneurs post-1970.

Description of Activity
Present the following description to students:

Successful business people of the pre-World War II era used resources and faced obstacles that were quite different than those faced by the present-day entrepreneur. Industrial giants of the 1940's were able to amass immense wealth and wield power unlike the government regulated businesses of the 90's. That’s not to say, however, that today’s young entrepreneurs are daunted by the restrictions imposed upon them. The entrepreneurial spirit and drive of yesteryear continues to be defined in countless new technological and service enterprises as well as in the reinvention of the old.

- Your team is to produce a comparison of the past with the present.
- Select one entrepreneur from the pre-World War II era and one modern entrepreneur (from 1970-today). You may choose from the list provided to you or you may select one of your own. (see attached)
- Use the outline provided to research the information on each individual. You may use periodicals and/or the Internet. You will be graded on the thoroughness of your outline, so fill in as much information for the outline as possible.
- Create a wall design displaying your information. Divide your information and your wall design into two sections: one for each entrepreneur. Be creative.
- Present your information in a short oral report. Include:
  - The vision the individual used to create his or her product or service
  - What made it easy, what made it difficult for each individual to pursue his/FCSr dream.
  - What assets did the individual possess (money, talent, skill)
  - What difficulties would the pre-World War II entrepreneur face if he or she had to start a business today
- Discuss the role each team member played in completing the project.

Materials/Resources
- Informational outline (see attached)
- Computer
- Internet access (optional)

Comments/Modifications

Assessment/Evaluation
- Scores for team members may be based on a point system. (see attached)

Source/Credit
Submitted by JoAnn Bagnoli, Fort Plain High School, 1999.
CHARACTERISTICS OF AN ENTREPRENEUR

INFORMATIONAL OUTLINE

I. Background of Entrepreneur

1. Name – Name of company
2. Profile of individual
   a) age
   b) education
   c) skills, abilities and interests
3. What motivated the individual to start a business – define the niche

II. Background of Company

1. What does the company produce or serve?
2. What were some of the early successes and failures of the business; of the entrepreneurs?
3. Is there a philosophy that the business is run by?
4. What has made the business successful?

List of choices:

Pre World War II                      Modern Day
J. P. Morgan                         Ben and Jerry Ice Cream
J. D. Rockefeller                   Nantucket Nectarines
W. R. Hearst                         William Gates
Joseph Kennedy                       Steve Jacobs, Apple Computers
J. P. Getty                          Tommy Hilfiger
                                       Donald Trump

Source: JoAnn Bagnoli, Fort Plain High School, 1999.
## CHARACTERISTICS OF AN ENTREPRENEUR

### TEAM GRADE

**TEAM MEMBERS:**

<table>
<thead>
<tr>
<th>PERFORMANCE FACTORS</th>
<th>10-9 points</th>
<th>8-6 points</th>
<th>5-3 points</th>
<th>2-0 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choice of entrepreneurs was appropriate to the assignment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choice of research was appropriate to the assignment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outline was complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outline was organized, clear and factual</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation covered all points listed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wall Design was organized, factual and visually appealing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### SCORE
Title of Activity: Interpersonal Dynamics

OBJECTIVE
Students will experience firsthand various interpersonal dynamics that arise during group activities.

DESCRIPTION OF ACTIVITY -
- Break students into groups of 4 to 5. Provide each group with a tinker toy container.
- Students are instructed to build a free-standing structure. The goal is to build the tallest structure possible. This should be accomplished in 10 minutes. The class then votes on the best structure after a group evaluation.

Teacher directed questions:
- How did the group decide what to built?
- Who emerged as a leader and why?
- Discussion and presentation of leadership styles, traits and skills, as well as team dynamics.
- Repeat activity with different structure being built and students appointed by the teacher to be the leader without being known to the group.
- Continue discussion about leadership and teamwork.

MATERIALS/RESOURCES
- Tinker toys

COMMENTS/MODIFICATIONS

ASSESSMENT/EVALUATION

SOURCE/CREDIT
Submitted by Maryellen Symer and JoAnne Davies, 1999.
## SAMPLE ACTIVITY

### Business/Information Systems

#### Title of Activity: International Business Travel

<table>
<thead>
<tr>
<th>GRADE</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
</table>

#### OBJECTIVE
- Students will use the Internet for research purposes.
- Students will demonstrate the ability to prepare a structured itinerary.
- Students will practice making wise consumer decisions.
- Students will demonstrate effective presentation skills.

#### DESCRIPTION OF ACTIVITY
See attached description.

#### MATERIALS/RESOURCES
- Computer
- Internet access
- Internet Sites for International Travel Information (see attached)
- Research Findings form (see attached)
- Itinerary (see attached)
- Sample Itinerary (see attached)

#### COMMENTS/MODIFICATIONS

#### LEARNING STANDARDS AREAS
- English Language Arts
- Languages Other than English
- Mathematics, Science, and Technology
- Health, Physical Education, Family, and Consumer Sciences
- Social Studies
- The Arts

#### SOURCE/CREDIT
Submitted by Jennifer Sanders, Burnt Hills-Ballston Lake High School
INTERNATIONAL BUSINESS TRAVEL

DESCRIPTION OF ACTIVITY

PROJECT GUIDELINES

- Students will use the Internet to research information on one foreign country.
- Students will use the Internet to find travel information, including airfare, hotel prices, etc.
- Students will prepare an itinerary with travel plans.
- Students will prepare an oral presentation of their findings.

Present the following scenario to students:

This project requires you, acting as an employee of a business, to research the country your business is hoping to expand to. You will need to find facts about this country and make travel plans for your business manager to attend a meeting while in this country. You should plan your research as if the meeting would be held in the country’s capital city.

- Research facts about the country: population, geographic area, demographic area, demographics, government structure, and economic structure
- Research economic facts: imports, exports, chief agricultural products, foreign exchange, currency, and transportation modes available.
- Research travel information: methods/cost of travel to the country, methods of travel while in the country, hotel accommodations, and communication modes available in the country.
- Research culture and customers: customs that affect business relations, holidays, major religions, and etiquette.
- Research eating habits: general cost of meals/restaurants, whether American food is served in that country, when people tend to eat, etc.

ITINERARY:

- An itinerary is an outline of the details of a planned trip. It includes departure and arrival times, meeting times, flight plans, hotel reservations, and other essential information.
- After your research is complete, an itinerary should be prepared detailing the business manager’s visit to the country. This itinerary should cover the moment the executive walks out the door en route to the airport to the moment the executive lands safely back in the United States and arrives back in __________. Be sure to allow adequate travel time.
- The trip should last no longer than three business days. The budget should be between $1000 - $2000, though the less the cost, the more impressed your boss will be.

PRESENTATION:

- Prepare a presentation to share your findings with the rest of the class.
INTERNET SITES FOR INTERNATIONAL TRAVEL INFORMATION

The following list contains various sites for researching country information and making travel arrangements on the Internet.

<table>
<thead>
<tr>
<th>Site</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Express Travel</td>
<td><a href="http://www.americanexpress.com/travel/">http://www.americanexpress.com/travel/</a></td>
</tr>
<tr>
<td>Asia Travel</td>
<td><a href="http://www.asiatravel.com">http://www.asiatravel.com</a></td>
</tr>
<tr>
<td>AT&amp;T Worldwide Traveler</td>
<td><a href="http://www.att.com/traveler">http://www.att.com/traveler</a></td>
</tr>
<tr>
<td>Business Travel Online</td>
<td><a href="http://www.btonline.com">http://www.btonline.com</a></td>
</tr>
<tr>
<td>Cyber Air Broker</td>
<td><a href="http://www.airdiscounter.com/frames/">http://www.airdiscounter.com/frames/</a></td>
</tr>
<tr>
<td>Hotels and Travel on the Net</td>
<td><a href="http://www.hotelstravel.com/homepage.html">http://www.hotelstravel.com/homepage.html</a></td>
</tr>
<tr>
<td>International Business Kiosk</td>
<td><a href="http://www.webcom.com/one/world/">http://www.webcom.com/one/world/</a></td>
</tr>
<tr>
<td>Internet Travel Network</td>
<td><a href="http://www.itn.net">http://www.itn.net</a></td>
</tr>
<tr>
<td>Travel Source</td>
<td><a href="http://www.travelsource.com/index.html">http://www.travelsource.com/index.html</a></td>
</tr>
<tr>
<td>Travelocity</td>
<td><a href="http://www.travelocity.com">http://www.travelocity.com</a></td>
</tr>
<tr>
<td>TRIP.Com</td>
<td><a href="http://www.thetrip.com">http://www.thetrip.com</a></td>
</tr>
</tbody>
</table>
COUNTRY ____________________________________________________________
Capital City _________________________________________________________
Population __________________________________________________________
Geographic Area _____________________________________________________
Demographics _________________________________________________________
Geographic Structure _________________________________________________
Economic System ______________________________________________________

ECONOMIC FACTS
Imports __________________________________________________________________
Exports __________________________________________________________________
Chief Agricultural Products ______________________________________________
Foreign Exchange _________________________________________________________
Currency __________________________________________________________________
Transportation Modes ___________________________________________________

TRAVEL INFORMATION
Methods/Costs of Travel to the Country ______________________________________
Methods of Travel while in the Country _______________________________________
Hotel Accommodations _____________________________________________________
Communication Modes Available while in the Country ___________________________
CULTURE

Customs

Holidays

Major Religion

Etiquette

EATING HABITS

General Costs of Meals/Restaurants

Is American Food Served in the Country?

When Do People Tend to Eat?

OTHER FINDINGS

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

Source: Jennifer Sanders, Burnt Hills-Ballston Lake High School, 1999.
ITINERARY: schedule of events, three business days, budget = $1000 - $2000.

ITINERARY
SAMPLE ITINERARY

ITINERARY FOR RAYMOND SMITH

May 17 – 19, 2000

Wednesday, May 17, 2000
8:30 a.m. Leave for airport.
10:00 a.m. Delta Flight 704 Chicago
11:50 a.m. Arrive O’Hare International Airport; met by Karen Calendar, District Manager, North Central Division.
3:30 p.m. Meet with sales representatives for briefing on new products, Prescott Room.
7:00 p.m. Dinner at Candle House Restaurant, 2415 North Vine Street. Reservation made for seven people.

Thursday, May 18, 2000
9 a.m. – noon Tour of New Products Division, Mount Prospect plant with Ms. Calendar
12 noon Lunch with Adam Wesley, V.P. for New Products.
Afternoon Meet with Milwaukee Division managers, Cater Room, adjacent to Prescott Room.

Friday, May 19, 2000
9:30 a.m. Leave for O’Hare.
11:15 a.m. Delta Flight 409 to Atlanta, lunch served.
1:05 p.m. Arrive Atlanta.
OBJECTIVE
Students will use technology resources to analyze and present information about two comparable companies.

DESCRIPTION OF ACTIVITY
- Students procure from the Internet one copy of a balance sheet and an income statement from a multinational firm and will format and mail a letter requesting a balance sheet and an income statement from another multinational firm of similar size and product type (i.e., two computer firms).
- Students utilize a spreadsheet to determine each of the following ratios for each firm.
  - Current ratio
  - Acid test ratio
  - Working capital (expressed in dollars)
  - Merchandise inventory turnover ratio
  - Net sales to advertising ratio
- Students select, input, format, and label the required elements for the requested ratios into a spreadsheet. They prepare and input the formulas required for determining the ratios or dollar amounts.
- Students ensure a working knowledge of the ratios under discussion. They analyze and compare the ratios of both companies.
- Students prepare an oral presentation utilizing presentation graphics to represent each of the ratios above. The presentation should be 5-minutes, including five to ten slides with the following information:
  - Definition and purpose of each ratio
  - Comparisons of each company’s ratios expressed in line graph format
  - Opinion of position each company is in relative to the other company

MATERIALS/RESOURCES
- Computer
- Internet access
- Spreadsheet and presentation software (i.e., Excel, PowerPoint)

ASSESSMENT/EVALUATION

SOURCE/CREDIT
Submitted by Robert Metz, Springville-Griffith Institute, 1999.
SAMPLE ACTIVITY

Business/Information Systems

Title of Activity: Using Technology

<table>
<thead>
<tr>
<th>GRADE</th>
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<th>10</th>
<th>11</th>
<th>12</th>
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</thead>
</table>

Estimated Time: 6 weeks

**OBJECTIVE**
- Students will demonstrate their ability to locate specific information on the word-wide web regarding the legality of investing excess municipal funds. (See “legal opinions” in the Office of the New York State Comptroller’s Office website: http://www.osc.state.ny.us/localgov/)
- Students will utilize the Internet to determine the highest six-month interest rates on certificates of deposit (CD).
- Students will use a spreadsheet to maintain basic information on the top four CD’s.
- Students will manipulate the spreadsheet to locate the best rate.
- Students will electronically link information from the spreadsheet to the word processed document.

**COMMENCEMENT CDOS STANDARDS**

<table>
<thead>
<tr>
<th>Business/Information Systems (3B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Basic Business Understanding</td>
</tr>
<tr>
<td>2. Business-Related Technology</td>
</tr>
<tr>
<td>3. Information Management/Communication</td>
</tr>
<tr>
<td>4. Business Systems</td>
</tr>
<tr>
<td>5. Resource Management</td>
</tr>
<tr>
<td>6. Interpersonal Dynamics</td>
</tr>
</tbody>
</table>

**Career Development (1)**
- 1. Complete development of career plan
- 2. Apply decision-making skills in selection of a career option
- 3. Analyze skills and abilities in a career option

**Integrated Learning (2)**
- 1. Demonstrate integration and application
- 2. Use academic knowledge and skills
- 3. Research, interpret, analyze, and evaluate information

**Universal Foundation Skills (3A)**
- 1. Basic Skills
- 2. Thinking Skills
- 3. Personal Qualities
- 4. Interpersonal Skills
- 5. Technology
- 6. Managing Information
- 7. Managing Resources
- 8. Systems

**ASSESSMENT/EVALUATION**
Students who successfully complete all required components will receive a grade of 100.
Students will be charged one-half of a letter grade for each question that they pose on:
- Locating appropriate web sites
- Evaluating the information found at the web sites
- In the preparation of spreadsheet
- In the preparation of their “opinion” to the local supervisor
- In the sending of the “opinion” or attached documents electronically to the supervisor.

**SOURCE/CREDIT**
Submitted by Robert Metz, Springville-Griffith Institute, 1999.
USING TECHNOLOGY

DESCRIPTION OF ACTIVITY

Use of Information:

1. Utilize the Comptroller’s website [http://www.osc.state.ny.us/localgov/ (look in “legal opinions”)] to review and analyze legal opinions as they relate to the acceptability of various interest-bearing instruments.
2. Utilize the AOL/Quicken website (http://quicken.aol.com/banking_and_credit) locate the top, current rates of return on six-month certificates of deposit within the United States.

Synthesis:

3. Select the top four financial organizations and enter all available information into the spreadsheet.
4. Use the spreadsheet, determine the amount of interest for the 6-month CD for the first CD.
5. Reorder the certificates of deposit in reverse numeric order based upon the interest rate using a macro.
6. Generate a line graph reflecting interest rates for the top four financial institutions. (See attached sample.)
7. Prepare a form letter referencing the appropriate legal opinion and/or General Municipal Law, along with the related financial institution’s name, rate, and anticipated interest income using a “special link” to the spreadsheet. (See attached sample.)

Using Technology – Modification of Activity:

8. As the accountant for the Town of Concord, the supervisor has informed you that the town has received its property taxes for the 2000-2001 tax year. You understand and explain to the supervisor that a portion of the funds will not be needed for six months and could be invested.
   ▪ What types of investments would be acceptable to the Comptroller of the State of New York?
9. Find at least four approved investment organizations and graph their current certificate of deposit rates for a 60-day term.
10. Utilize a spreadsheet to determine the proceeds from each of the four top, approved investment organizations. Update this spreadsheet as appropriate.
11. Use the spreadsheet to record the name, phone, minimum deposit, rate, and yield for each approved investment organization. (See attached sample.)
12. Sort this information in descending order based on yield.
13. Format a written recommendation to the town supervisor with your recommendation for the investments. Link the appropriate spreadsheet cells to the written recommendation to ensure that the information related to the best rate available is selected.

SAMPLE LINE GRAPH
REFLECTING INTEREST RATES
FOR THE TOP FOUR FINANCIAL INSTITUTIONS

July 11, 2000

Mr. Murray Regan, Supervisor
Town of Alta Vista
123 Centerline Road
Alta Vista, NY 14111

Dear Mr. Regan:

Based upon an internet search of the best rates for six-month certificates of deposit, I recommend that the Town of Alta Vista invest their excess funds with Key Bank USA, which is currently paying 5.300% interest.

Investments with this bank meet the requirements as established by the Comptroller of the State of New York per General Municipal Law, 10, CH 708.

Sincerely,

John Jones
Consultant
## SAMPLE SPREADSHEET

<table>
<thead>
<tr>
<th>NAME</th>
<th>PHONE</th>
<th>MINIMUM DEPOSIT</th>
<th>RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Bank USA</td>
<td>800 872-5553</td>
<td>$ 5,000.00</td>
<td>5.500%</td>
</tr>
<tr>
<td>First Market Bank</td>
<td>800 968-3824</td>
<td>$ 5,000.00</td>
<td>5.43%</td>
</tr>
<tr>
<td>Providian Bank</td>
<td>800 414-9603</td>
<td>$10,000.00</td>
<td>5.310%</td>
</tr>
<tr>
<td>Providian National Bank</td>
<td>800 821-9049</td>
<td>$10,000.00</td>
<td>5.310%</td>
</tr>
<tr>
<td>Key Bank USA</td>
<td>800 872-5553</td>
<td>$ 5,000.00</td>
<td>5.50%</td>
</tr>
<tr>
<td>Investment Amount</td>
<td>$1,200,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Month Interest</td>
<td>$ 33,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

SAMPLE OF AOL/QUICKEN WEBSITE

# SAMPLE ACTIVITY

**Business/Information Systems**

**Title of Activity:** Preparation for the Workplace

<table>
<thead>
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</table>

**Estimated Time:** 2-4 hours

## OBJECTIVE
Students will experience working on an assembly line, as an apprentice, within a group to complete a task. This session will provide two scenarios of learning skills in a given industry in two ways – individual training and group training.

## DESCRIPTION OF ACTIVITY
- See attached description.

## COMMENCEMENT CDOS STANDARDS

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### Career Development (1)

1. Complete development of career plan
2. Apply decision-making skills in selection of a career option
3. Analyze skills and abilities in a career option

### Integrated Learning (2)

1. Demonstrate integration and application
2. Use academic knowledge and skills
3. Research, interpret, analyze, and evaluate information

### Universal Foundation Skills (3A)

1. Basic Skills
2. Thinking Skills
3. Personal Qualities
4. Interpersonal Skills
5. Technology
6. Managing Information
7. Managing Resources
8. Systems

## MATERIALS/RESOURCES

<table>
<thead>
<tr>
<th></th>
<th>1. Basic Skills</th>
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<td></td>
<td>2. Thinking Skills</td>
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<tr>
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<tr>
<td>8. Systems</td>
<td></td>
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</tbody>
</table>

## LEARNING STANDARDS AREAS

<table>
<thead>
<tr>
<th>English Language Arts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Languages Other than English</td>
</tr>
<tr>
<td>Mathematics, Science, and Technology</td>
</tr>
<tr>
<td>Health, Physical Education, Family and Consumer Sciences</td>
</tr>
<tr>
<td>Social Studies</td>
</tr>
<tr>
<td>The Arts</td>
</tr>
</tbody>
</table>

## COMMENTS/MODIFICATIONS

- See attached description.

## ASSESSMENT/EVALUATION

- See attached description.

## SOURCE/CREDIT
PREPARATION FOR THE WORKPLACE

DESCRIPTION OF ACTIVITY

Teacher contacts a local business in local area that will provide students the opportunity to work as an apprentice. [Note: I visit a sheet-metal plant that prepares covers and does assembly of the CPU for computers. They allow us to bring students to work on the computer assembly line, and then gives them the ability to work in the group aspect of assembling a computer case—a tower made with plastic parts, and adding the power supply, racks for disk drives, CD-Rom drives, memory banks.]

TASKS:

1. Students learn from the worker his/FCSr job in the assembly line.
   a. Student takes the place of the worker in the line for a half hour with the worker helping you be sure to stay up with the line.
   b. Complete the workers’ job without supervision for a half hour.
   c. Learn the worker’s neighbor’s job ahead of you on the line in case of emergency to keep the line working.

2. Group training.
   a. Divide students into three groups
      i. First group will receive complete training on assembling a part
      ii. Second group will receive random parts training
      iii. Third Group will receive no training on assembly parts
   b. Given a definite period of time each group must assemble the product to completion

3. Bring all groups back together – discuss the value of training versus the non-training and the partial training.
   a. Ask students to reflect: What skills were needed with no training?
      i. Observation of assembly parts
      ii. View of finished product and ability to de-assemble mentally
      iii. Observation of connecting parts
   b. Ask student to reflect: What problems arose in each training method?
   c. Discuss – should all employees know the entire product assembly?
   d. Discuss different pay scale methods for assembly work. Compare it to salaried workers?
   e. What motivational techniques can be used to keep the product at maximum production levels?
   f. Which method of reward appears to be most beneficial for a career as an assembly worker?

4. Students write the manual for training the new employee in the position they learned for the project.

5. Determine whether you would like to work this way for a long period of time versus acceptance of this kind of work for a short period of time.

6. Write a letter to a friend describing your training experience, expressing views of what the real workers told you, and your views on working on an assembly line for life.

NOTE:
You may design your own assembly line using a variety of objects – a booklet that has to be put together, with cover, photographs, etc. Another assembly object could be a series of Legos or Lincoln Logs, to develop a final project (e.g., car, plane, house, barn, etc.). Other ideas include: a cafeteria food line for a sports dinner, a computer software project requiring design, data entry and printing. You will need to develop trainers using this assembly section.

## RUBRIC FOR
### Preparation for Workplace

<table>
<thead>
<tr>
<th>Performance Factors</th>
<th>10-9 Excellent/Successful</th>
<th>8-6 Above Average</th>
<th>5-3 Adequate</th>
<th>2-0 Unadequate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training</strong></td>
<td>Excellent for product</td>
<td>Satisfactory—some I had to figure out</td>
<td>Inadequate—most required my figuring it out</td>
<td>None--</td>
</tr>
<tr>
<td><strong>Dexterity/skills</strong></td>
<td>Excellent—easy to assemble, my skills above average to keep line going—waiting for next part to arrive</td>
<td>Good—held up line once or twice, completed just before next part arrived</td>
<td>Fair—took some time to develop a system, interrupted line more than a few times</td>
<td>No system, disrupted line all the</td>
</tr>
<tr>
<td><strong>Observation</strong></td>
<td>Grasped instructions immediately</td>
<td>Shown a second time</td>
<td>Shown several times</td>
<td>Did not get how to assemble by showing</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td>Jumped in feet first immediately</td>
<td>Jumped in after several tries to complete task</td>
<td>Slow to jump in</td>
<td>Didn’t want to participate</td>
</tr>
<tr>
<td><strong>Mental view of production</strong></td>
<td>Grasped immediately without training</td>
<td>Took some time without being shown</td>
<td>Grasped some but needed some basic instruction</td>
<td>No comprehension without instruction</td>
</tr>
<tr>
<td><strong>Acceptance of work for a lifetime</strong></td>
<td>Yes—I like doing this work, rewards what I want</td>
<td>Would accept for a short time—rewards adequate for temporary work</td>
<td>Not my desire for a career—I will find some thing else for me, rewards not here</td>
<td>Would never accept this line of work--</td>
</tr>
<tr>
<td><strong>Manual</strong></td>
<td>Easy to write and give good directions to complete the task</td>
<td>Easy to write part of the directions, some more difficult but not unable to complete task</td>
<td>Poor language to provide directions, partially written but incomplete directions</td>
<td>Unable to write directions to complete my task on line</td>
</tr>
</tbody>
</table>

Total Evaluation _______________________

Total Review of Situation__________________

SAMPLE ACTIVITY

Business/Information Systems

Title of Activity: Getting the News

<table>
<thead>
<tr>
<th>GRADE</th>
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<th>12</th>
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</table>

OBJECTIVE
- Students will read newspapers and record, discuss, and present to the class the Top 10 newsmakers of the week.

DESCRIPTION OF ACTIVITY
- Divide the class into groups of four. Each member will have a Money section of USA Today. The students will read and research a week's worth of stories and create a list of the Top 10 newsmakers (people or events) of the week. The groups will discuss and prioritize the stories until they have narrowed the list to the Top 10.
- They then create a chart to present to the class. It may be created as a tag board poster, PowerPoint presentation, or utilizing other appropriate software programs. Graphics are available online at www.usatoday.com. Students groups will then present the chart to the class and create discussion concerning the article topic and justification of the prioritization selections.
- As a follow-up activity each student selects one of the articles and provides a written reaction to the article content in a writing journal. The student must provide a written response in paragraph form to the following questions:
  - Summarize the main points of the article.
  - What aspect of material covered in class does this article relate to?
  - How can you use this information in your life presently or in the future?
  - What prediction can you make based on the facts of the article?

** For further information on USA Today teacher programs call 1-800 USA-TEACH

MATERIALS/RESOURCES
- Computer
- Software (e.g., PowerPoint, Excel)
- Internet access
- Website (www.usatoday.com)

COMMENT/MODIFICATIONS

ASSESSMENT/EVALUATION

SOURCE/CREDIT
Submitted by Gregory Pigeon, Riverside High School, 1999.
## CROSS REFERENCE
### Business/Information Systems Sample Activities

<table>
<thead>
<tr>
<th>SAMPLE ACTIVITIES</th>
<th>CDOS 3B</th>
<th>CDOS 1</th>
<th>CDOS 2</th>
<th>CDOS 3A</th>
<th>ELA</th>
<th>LoTA</th>
<th>MST</th>
<th>HE/PE/ FCS</th>
<th>SS</th>
<th>ARTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Toy Makers</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>2. Mind Your Own Business</td>
<td>✔️</td>
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<td>3. Creating a Fantasy Team</td>
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<td>4. Marketing Maneuvers</td>
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<td>5. Moving Out</td>
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<td>6. Characteristics of the Entrepreneur</td>
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<td>7. Interpersonal Dynamics</td>
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<td>8. International Business Travel</td>
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<tr>
<td>9. Financial/ Administrative Systems</td>
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<td>10. Using Technology</td>
<td>✔️</td>
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