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## **A Resource Guide for Seattle School District Beginning Marketing Teachers**

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A Resource Guide for Seattle School District

Beginning Marketing Teachers

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A Project Report

Presented to

The Graduate Faculty

Central Washington University

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In Partial Fulfillment

of the Requirements for the Degree

Master of Educational Administration

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By

Damen Scott Schuneman

April, 2002

ABSTRACT

PROFESSIONAL AND TEACHING GUIDELINES  
FOR BEGINNING MARKETING TEACHERS

by

Damen Scott Schuneman

April, 2002

A Marketing Education/ DECA program is an important link to building the bridge between high school students and potential employers. The importance of offering a Marketing/DECA program is equal to the importance of having a well-trained staff member that has the guidance and tools to be a successful marketing teacher and DECA advisor. A training tool for beginning marketing teachers presents the opportunity for beginning marketing teachers to gain valuable tips and information on how to develop and maintain a Marketing/DECA Program. The Resource Guide for Beginning Marketing Teachers provides the background information for beginning marketing teachers to begin facilitating and supervising a Marketing/DECA program. The success of the Resource Guide for Beginning Marketing teachers relies on the commitment to staff development from the teacher, vocational director and administration.

## ACKNOWLEDGEMENTS

This project is dedicated to my family and friends that gave me the strength and guidance to complete my project. My father Fred, mother Nancy and my soul mate Stacey. They were always there encouraging me to finish my project and graduate.

The writer is also grateful to Dr. Gary Shelly for taking his personal time to be my advisor and see that my project was completed. Additional thanks goes to Dr. Jack McPhearson and Dr. Frank Carlson for taking the time to serve as committee members.

Lastly I would like to sincerely thank all of the staff at the CWU Sea-Tac Center for making my educational experience a pleasant one.

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# CHAPTER ONE

## BACKGROUND OF THE STUDY

### Introduction

“After decades of school reform, a consensus is building that the quality of our nation’s schools depends on the quality of our nation’s teachers. Policy makers and educators are coming to see that what students learn is directly related to what and how teachers teach; and what and how teachers teach depends on the knowledge, skills and commitments they bring to their teaching and the opportunities they have to continue learning in and from their practice.” (Feiman-Nemser, 1999, p.1).

As explained by Feimen-Nemser in the above statement, professional development has played an essential role in the success of student achievement.

Ball & Cohen (1999) emphasized that unless teachers have access to serious and sustained learning opportunities at every stage in their career, they are unlikely to teach in ways that meet demanding new standards for student learning or to participate in the solution of educational problems.

Teachers today have been challenged to grow and master their art in order to make the educational experience for students productive and meaningful. Professional development, many experts believe, has been the focus for many learning institutions. Abdual-Haqq pointed out that awareness of professional development’s value in advancing school improvement is evident in several state and national reports (Abdual-Haqq, 1996).

### Purpose of the Project

The purpose of this project was to develop a resource guide to be utilized by beginning marketing teachers in the Seattle School District. The project was designed to

provide basic teaching support to inexperienced marketing teachers and to share ideas which could immediately be implemented into the classroom. It was also designed with the intent to provide a forum for experienced teachers to share their expertise with colleagues in the Seattle School District by adding additional information to the guide such as lesson plans, materials, activities, and organizational guidelines.

The resource guide focused on the marketing curriculum, co-curricular activities, marketing laboratory (student store), and the latest techniques in marketing education. Emphasis was placed on the most current course content and teaching methods.

#### Limitations of the Project

For the purpose of this project, it was necessary to set the following limitations:

1. Scope: The project was limited to marketing teachers in the Seattle School District in the State of Washington.
2. Participants: The project was limited to volunteer marketing teachers and their students in grades 9-12.
3. Research: The literature reviewed in Chapter Two of this project was selective in nature and limited to the last 10 years.
4. Curriculum: The project was aligned with the required five skill levels by the Seattle School District for the high school marketing programs.

#### Definition of Terms

Significant terms used in the context of this study have been defined as follows:

1. Advisory Committee: A selected group of marketing professionals from the local business community that act as a liaison between education and industry.



2. Chapter Advisor: The adult charged with the responsibility of providing guidance and counsel for the management and operation of marketing chapters and state associations.
3. Conferences: The official term for district, state, or national meetings of DECA activities.
4. Curriculum Based Skills: Five skill levels used in the curriculum planning for marketing education.
  - A. Entry Level: Marketing occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous marketing educational experiences and or commitment to a marketing career. Competencies required to secure and hold such a job address good personal appearance, general business behavior, and basic skills such as math and communications. Examples include: cashier, bagger, counter person, clerk, driver, attendant, or order taker.
  - B. Career Sustaining Level: Marketing occupations involve performing more complex duties and using routine decision-making skills. A limited sustaining-level job should have a basic understanding of the marketing concept, its foundations, and have indicated an initial interest in marketing as a potential career. Examples include: salesperson, reservationist, waiter-waitress, customer service representative, or stock person.
  - C. Marketing Specialist Level: Involves frequent use of decision-making and leadership skills. Jobs at this level require mastery of marketing skills across functions or extensive technical knowledge/skill in one function such as selling or

advertising. Individuals at the marketing specialist level need to have a thorough understanding of the marketing concept and its functions. Examples include: professional salesperson, copywriter, buyer, or manufacturer's representative.

D. Marketing Supervisor Level: Involves a high level of competence in decision making and leadership. Individuals in this role are responsible for planning, coordinating, and supervising people and or marketing-related activities.

Examples include: departmental manager, supervisor, shift manager, buyer, convention manager, or sales manager.

E. Manager/Entrepreneur Level: Implies competence in a variety of tasks relating to owning one's own business or managing a department within an organization.

Individuals at this level are fully responsible for the success or failure of a unit within an organization or of a small business enterprise. A comprehensive understanding of marketing and management competencies is required to function in this role. Examples include: merchandise manager, marketing manager, store manager, or owner.

5. DECA: Identifies a program of student activity relating to marketing. It is designed to develop future leaders in marketing, management, and entrepreneurship.
6. Delegate Assembly: Official time to elect student officers for the coming school year.
7. Delta Epsilon Chi: The post-secondary division of DECA that allows student to continue their DECA participation while enrolled in a postsecondary marketing-related degree program.
8. Marketing Education: Identifies a program of instruction in marketing, management, and entrepreneurship.

9. Marketing Laboratory: The marketing laboratory is also known as the School Store.

The Marketing laboratory is a student ran store that provides a training experience for those students that have little or no retail experience. Within this training station students learn skills such as cash register operation, human relations, selling techniques, display and inventory skills.

10. National Career Development Conference: Taking place in the Spring, the National CDC is the climax of the year's activities and the culmination of members', advisors' and National DECA's efforts throughout the year. Student members, advisors, and other contributing persons or organizations are recognized for individual and group leadership, achievement, and active participation. National CDC focuses on the DECA Competitive Event Program and includes the election of national officers, leadership and professional development activities and social functions.

11. Regional Fall Leadership Conference: Annual conference for members of a particular region of DECA focusing on student leadership professional development, and regional activities. All four regions of DECA hold an annual regional conference.

12. State Fall Leadership Conference: Annual State conference that focuses on student leadership and professional development.

13. Teacher Coordination Period: Teacher coordination period is used by the coordinator (often the marketing teacher), to call on the student's employer, evaluate job development, attend marketing professional meetings, and coordinate the entire marketing program.

14. Tech Prep: Programs offering at least four years of sequential coursework at the secondary and postsecondary levels to prepare students for technical careers. Students

that complete the Introduction to Marketing course with a “B” grade or better receive college credit at specified colleges.

15. Vocational Certification: Marketing education requires instructors to obtain a valid Washington State teaching certificate, and a current Washington State Marketing Education Vocational Certificate.
16. Work-based Learning: Work-based learning incorporates a variety of different learning experiences which generally involve schools and employers. Many of the learning experiences include short and long term training, employment, and internships.

## CHAPTER TWO

### REVIEW OF RELATED LITERATURE AND INFORMATION OBTAINED FROM SELECTED SOURCES

#### Introduction

The review of current literature, computer research which included the Education Research Information Center (ERIC), the Internet and Local, State and Regional DECA workshops has been organized to address:

1. Current Research in Marketing Education
  - a. Need for Marketing Education/DECA Program
  - b. Description of Marketing Education/ DECA Program
  - c. The Development and Implementation of Career Academies
2. Summary of Information Obtained from Selected Sources
3. Summary

#### Current Research in Marketing Education

Historically, educational institutions have had a responsibility to include in their curriculum techniques for helping students develop entrepreneurial skills so that they will not be among the 45 percent of small businesses that fail within their first year (Chambers 1989). Bailey (1997) & Packer (1998) added that this environment required a behavior and orientation toward work that has gone beyond step-by-step task performance. Workers at all levels have been expected to solve problems, create ways to improve the methods they use, and engage effectively with their coworkers.

A recent report compiled by researchers from Rutgers University and the University of Connecticut emphasized that fifty-five percent of the 1,014 U.S. workers interviewed in May by the authors of *Making the Grade?: What American Workers Think Should Be Done to Improve Education* gave U.S. high schools a "C" or worse in the subject of preparing students for success in the workplace. Only 16 percent of the respondents gave the high schools an "A," while 32 percent said a "B" was appropriate (Thompson, 2000). Thompson (2000) also stated:

“ In today's knowledge-based economy, it's difficult-if not impossible-to design a school curriculum or job training course that won't become obsolete with the next sea change in workplace technologies. So, U.S. high schools shouldn't be saddled with all of the blame for American workers' lack of skills. But the cognoscenti in government, academia and the U.S. business community believe high schools could do a much better job of teaching students not only the skills-but also the attitudes-- that they'll need to become and remain productive workers.”

According to Ferrell (1995), "Marketing education is changing at an increasing rate, and by the year 2000, most faculty will need to adapt to an environment that will be significantly different from today" (p.6).

#### Need for Marketing Education/DECA Program

“Marketing education should be like marketing itself: dynamic, ever-new and ever-changing. Today marketing is riding a wave of popularity. The evidence is everywhere. You'll find position announcements in newspapers, on the Internet and through career placement services that are dominated by the demand for marketers. Companies that have jobs not directly defined as marketing positions are often seeking people who have marketing skills and attitudes. Government agencies are forecasting marketing jobs at or near the top of categories projected to have the greatest growth potential” (Wisconsin's Model Academic Standards, p. 1).

According to Harrison (1987), in recent years, the need to help students develop employability skills and higher-order thinking skills has become more evident. Lankard

(1987) added that without this type of program offered at the high school level, many businesses have not been able to find entry-level workers with these qualifications. Many employers have noted that employability skills--skills that enable an individual to acquire and keep a job—have been of primary importance.

Huey & McCallar (2000) emphasized that the critical shortage of skilled labor has evolved, and cannot be solved by any one plan. A plan to develop the talent already available locally into the skilled workforce has been in need for some time and has been continuously neglected.

According to Carnevale & Desrochers (1999) the demand for skilled labor has increased and with that has come added incentives. For example, nurses were reported getting \$2,500 signing bonuses as the demand for skilled health-care workers remained strong. Burger King managers have been handed the keys to BMWs as bonuses and hotel chains such as Marriott International and Hyatt Corp. have been competing across the board for room maids, managers, and executives.

Carnevale & Desrochers added that there has been no slowdown in such white-collar areas as consulting or financial services. Banks and securities firms such as Deutsche Bank and Lehman Brothers Inc. have steadily grown with the economy.

“The new economy is more than a simple choice between cheeseburgers and microchips. It does not belong to Ronald McDonald or Bill Gates. The new economy belongs to the comic strip character, Dilbert, who works in an office, as do most American workers.” (Carnevale & Desrochers, 1999).

Carnevale & Desrochers (1999) also emphasized that the U.S. economy has transformed itself into a high skilled, high-wage services economy that is expected to keep growing. Reports have shown that people in jobs related to business and marketing earn

more money-50 percent of total U.S. earnings than in any other part of the economy. In 1995, for instance, office workers earned 47 percent more than non-office workers Carnevale & Desrochers (1999).

### Description of Marketing Education/DECA Program

The American Marketing Association (AMA) characterized marketing as:

“The process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives.” (Wisconsin’s Model Academic Standards, 1998 p.1).

Marketing education has been the basis for students to learn and develop skills identified by business and industry as being essential to successful employment in a variety of marketing and business occupations (Marketing Education Competency Guidelines, 1993).

Marketing education also has provided students the opportunity to gain insight, knowledge, and skills that concentrate on the democratic free enterprise system ((Wisconsin’s Model Academic Standards, 1998).

“Today when we speak of marketing, we include the activities of for-profit businesses, government, not-for-profit organizations, institutions, and individuals. We market not only goods, but also ideas, causes, places, services, performances, groups and people.” (Wisconsin’s Model Academic Standards, 1998 p.1).

The DECA chapter is to the marketing education program what a civic or professional organization is to a group of business people. DECA is a co-curricular, student centered organization designed to provide students with the opportunity to learn marketing, management and entrepreneurial competencies through goal oriented chapter activities. Chapter activities have been recognized as part of the total educational program



because these activities have continuously assisted in the development of leadership skills, professional attitudes, business competency, citizenship characteristics, and the social growth of the individual (Handbook for DECA Chapters, 1995).

### Development and Implementation of Career Academies

Marketing/DECA education has become a growing elective program within the secondary school system. Once a student has mastered the core competencies in the marketing program, designed programs that assist students in becoming specialized in a major component area become available. These component areas have been designed to give students an opportunity to specialize in a particular field. These components have included but are not limited to:

1. Advertising and Visual Merchandising
2. Entrepreneurship
3. Fashion Merchandising/Marketing
4. Financial Marketing
5. Food Marketing
6. Hospitality and Tourism Marketing
7. International Business/Marketing
8. Restaurant Management/Marketing
9. Retail Merchandising Marketing
10. Sports and Entertainment Marketing (Marketing Education Competency Guidelines, 1993).

From these major component areas career academies have been developed. A career academy is a high school program in which a group of students stay together with the same teachers for two, three, or four years. The curriculum program has focused on

organized instruction in academic subjects that relate to industry or an occupational theme. This has enabled students to fulfill requirements for college entrance in addition to acquiring work-related knowledge and skills (CASN, 2002). Career academies have been developed as a school restructuring tool intended to address these problems: to help cut dropout rates, to improve student performance, and to equip students to face the complexities of future employment (Burnett, 1992). Information compiled through studies on the impact of career academies have shown that students in career academies perform better in high school and are more likely to continue into postsecondary education, compared to similar students in the same schools (CASN, 2002).

#### Summary of Information Obtain from Selected Sources

The writer, Damen S. Schuneman contacted ten (10) selected high schools that offered marketing courses and gathered specific information related to the following issues:

1. Marketing Education
2. DECA
3. Student Store Rules and Procedures

Arlington High School  
Arlington, WA.

Cleveland High School  
Seattle, WA.

Highline High School  
Burien, WA.

Bellevue High School  
Bellevue, WA

Hazen High School  
Renton, WA.

Issaquah High School  
Issaquah, WA.

Liberty High School  
Issaquah, WA.

Lindbergh High School  
Renton, WA.

Mercer Island High School  
Mercer Island, WA.

Tyee High School  
Sea Tac, WA.

An analysis, of the information obtained from the sources, revealed that three (3) characteristics were generally common in Marketing Education/DECA Programs. They included:

1. Commitment: A strong component of all the programs was a commitment to the Marketing Education/DECA Program from the advisors. All program advisors logged in many extra hours preparing for competitions, planning for conferences and monitoring the student store.
2. DECA Involvement: Each school was actively involved in DECA. All programs supported DECA chapters and attended local, state and national conferences. Seven (7) of the programs had students represented as Area or State DECA Officers. All DECA programs competed in Area, State and National DECA Competitions as well.
3. Student Store Operation: Each school had a student store that was in collaboration with the DECA program. Students from the marketing department worked in the store and the advisor monitored the operations. Funds generated from the store where used to fund the DECA program.

### Summary

The research literature and information summarized in chapter 2 supported the following themes:

1. Marketing Education plays an intricate role in bridging the gap between high school students and the business industry through a cooperative occupational training program that prepares students to be readily employable in an entry-level marketing position.
2. Marketing education assists students in developing those skills identified by business and industry as being essential to successful employment in a variety of marketing and management occupations. The Marketing/DECA program provides employability training, along with focused attention on basic and social skills development.
3. Marketing/DECA Advisors teach, tutor, assist, and mentor students through a variety of Marketing/DECA related curriculum material and activities such as field trips, competitions, conferences, workshops, fund-raisers, Marketing Education Laboratory, and Work Based Learning Coordination.
4. Career academies are occupationally focused high school programs that are designed to help students focus on a particular career while completing high school.

## CHAPTER THREE

### PROCEDURES OF THE PROJECT

#### Purpose

The purpose of this project was to develop a resource guide to be utilized by beginning marketing teachers in the Seattle School District. The project was designed to provide basic teaching support to inexperienced marketing teachers and to share ideas which can immediately be implemented into the classroom. It was also designed with the intent to provide a forum for experienced teachers to share their expertise with colleagues in the Seattle School District by adding additional information to the guide such as lesson plans, materials, activities and organizational guidelines.

Chapter 3 contains background information describing:

1. Need for the Project
2. Development of Support for the Study
3. Procedures of the Project
4. Planned Implementation of the Study
5. Assessment and Evaluation

#### Need for the Project

The idea for developing a resource guide for beginning marketing teachers was influenced by the following considerations:

- a. The writers personal experience as a beginning marketing teacher hired with no previous experience to teach a new marketing program with no material available to

use other than outdated text books. Struggling through the first year of teaching, the need for a resource guide with lesson plans, activities, and information about co-curricular activities became more apparent.

- b. An increasing number of schools in the Seattle School District offered marketing education programs. Six of the nine Seattle Public Schools, presently have marketing programs and report increasing enrollment.
- c. A number of students enter the workforce with little or no college background and with only entry-level occupational skills. It is critical for teachers to have the necessary tools and guidance to prepare students with the skills necessary to succeed in the challenging and ever changing work place.
- d. With the increasing number of positions for marketing teachers in the Seattle School District, a resource guide would help the beginning marketing teachers make the transition and would decrease the amount of negative experiences and turnover rate.

#### Development and Support for the Project

The Seattle School District has continued to expand its focus on professional development efforts. These efforts have been designed to improve the capabilities of all district employees and enhance academic achievement in a standards-based environment.

Support from the building staff, building administrators, and district administrator's is critical for the development of this project. The support from the district administration begins with the approval of the project by the Vocational Director. Once the project has been submitted to the school district, the school's principal and

business/marketing department head will need to agree to the implementation of the project into their schools.

The ultimate success of the resource guide for beginning marketing teachers in the Seattle School district relies on the participation and support from the experienced marketing teachers. It is equally important for the experienced teachers to improve the resource guide by continually updating lesson plans, activities, and links to resources in order to help the marketing teachers of the Seattle School District become more effective teachers.

#### Planned Implementation of the Project

The resource guide for beginning marketing teachers will be presented by the writer for review by the Seattle School District marketing educators and support staff at the end of the 2002 school year. Implementation of the project presented on the following pages in Chapter four will be tentatively scheduled for the 2002-2003 school year.

#### Assessment and Evaluation of the Project

Following the implementation of the resource guide for beginning marketing teachers, an on going assessment will be conducted and modifications to the resource guide will be made accordingly with approval from the administration, vocational director, marketing educators, DECA advisors, and support staff.

## CHAPTER FOUR

### THE PROJECT

#### Purpose of the Project

The purpose of this project was to develop a resource guide that is to be utilized by beginning marketing teachers in the Seattle School District. The resource guide will be in the following pages of Chapter Four.



**A Resource Guide for**  
**Seattle School District**  
**Beginning Marketing Teachers**

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# Unit One

## **Unit I**

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## UNIT I

### MARKETING CURRICULUM AND COURSE OUTLINE

#### Introduction

Marketing education is a cooperative educational program that offers training in the field of marketing. Traditionally this training can take place at three levels of education; secondary post secondary, and adult education. For the purpose of this resource guide, the emphasis will be on the secondary level. Marketing education is a program that is designed to help students develop skills that will assist them in obtaining entry level employment in a variety of marketing and management occupations. The program provides employability training and social skills development (Billings, Pearson, Wood, & Crossman, 1993). The focus for students is to participate in a variety of areas which include work ethics, economic principals, promotional strategies and distribution process, safety, and developing leadership and civic involvement.

#### Purpose of the General Marketing Program

The purpose of the General Marketing Program is to prepare students to enter and advance in productive careers in marketing. This program focuses on enabling students to develop the knowledge and skills necessary to be successful in an entry level job. Examples of these jobs are cashier, teller, customer-service clerk, shipping and receiving clerk, stock clerk, delivery person, sales person, and waiter-waitress.

The marketing program is a balanced and coordinated program that is designed with the purpose of offering all students the opportunity to learn and utilize marketing concepts using the following four components.

1. The Classroom: Where the student is able to study in his/her chosen field
2. The Job Training Station: Where the student is able to apply what he/she is learning and further develop practical skills.
3. DECA: An association of marketing students where the student is able to develop leadership, professional, and social skills.
4. Student Store Laboratory: Where the student is able to put marketing principles into practice in a controlled environment (Billings, Pearson, Wood, & Crossman, 1993).

#### Goals of the General Marketing Program

The overall goal of the General Marketing Program should be to strive for balance throughout the program and focus on the development of students that are involved in the marketing program for more than one year. The broad goals of the General Marketing Program are to:

1. Provide secondary-level students the occupational preparation that will facilitate the development of competent workers in marketing.
2. Enhance the development of employability skills.
3. Reinforce basic skills in such areas as communication, mathematics, human relations, and reading.
4. Develop an understanding and an appreciation of the marketing concept and its application.

5. Stimulate student interest in career development.
6. Develop an understanding of the basic marketing functions.
7. Create an interest in the free enterprise system.
8. Assist in establishing relationships with local businesses and community partners.
9. Demonstrate awareness of employment opportunities in marketing occupations and acquire competencies required for successful careers in marketing occupations.
10. Utilize analytical decision-making skills through projects or cooperative educational activities.
11. Develop leadership, social and team building skills; civic awareness and vocational understanding. (Billings, Pearson, Wood, & Crossman, 1993).

### General Marketing Curriculum

Based on research and information gathered from industry as well as students, teachers, and marketing education specialists, a National Curriculum Committee has developed general marketing core competencies. From these core competencies, a curriculum framework was developed to assist in establishing a direction for marketing education programs. This curriculum framework offers a basic arrangement and organization of curriculum for marketing. The State of Washington has adopted these core competencies and framework and has designed a curriculum utilizing them. The framework and competencies allow any student to challenge their abilities and skills by

working towards various levels of marketing education. (Billings, Pearson, Wood, & Crossman, 1993).

The curriculum framework starts with three foundations of the National Marketing Educational Association's Core Curriculum (Farese, Kimbrell, & Woloszyk, 1997, p. T4). Those foundations are as follows:

1. Economic Foundations of Marketing: Basic principles and concepts of free enterprise and free market economics that are fundamental to an understanding of marketing activities.
2. Human Resources Foundations: Basic, general skills and understanding critical to success in most occupations, including aspects of human relations, communications and math. This also includes the units titled career development and management.
3. Marketing and Business Foundations: Basic skills and understanding of the marketing concept and the business environment and management system within which it is implemented.

The National Marketing Educational Association suggests the remainder of a general marketing program should concentrate on the nine functions. The nine functions of marketing are as follows:

1. Distribution: Activities associated with the physical movement or transfer of ownership of a product or service from the producer to the consumer.
2. Financing: Determining the need for an availability of financial resources to facilitate marketing activities.



3. Marketing Information Management: Procedures and methods for the continuous gathering, analyzing and disseminating of information to facilitate marketing decisions.
4. Pricing: Determining an exchange price at which the buyer and seller perceive optimum value for the good or service.
5. Product Planning: The process of involving all business decisions regarding the sale of goods or services.
6. Promotion: Any form of communication used to inform, persuade, or remind people about a business's products.
7. Purchasing: Planning and procedures necessary to obtain goods and services for use in the business for resale.
8. Risk Management: The management process of preventing or reducing business loss.
9. Selling: The process of providing customers with the goods or services they want to buy. (Farese, Kimbrell, &Woloszyk, 1997, p. T4)

### General Marketing Competencies

All competencies identified in the Resource Guide for Seattle School District Beginning Marketing Teachers are part of the national core curriculum for marketing education or have been identified as important skills or concepts for an employee in marketing. The competencies were identified through occupational research, analysis by staff and consultants and input from a variety of marketing publications. Below is a list of the general marketing competencies.

### Subtopic 1: Marketing and Business Fundamentals

- 1.01 Describe the nature of business activities
- 1.02 Explain marketing and its importance in a free enterprise system
- 1.03 Explain the concept of management
- 1.04 Describe the concept of production
- 1.05 Explain the concept of accounting
- 1.06 Explain the relationship between business and society
- 1.07 Describe the types of business ownership
- 1.08 Explain marketing functions and their related activities
- 1.09 Explain the concept of marketing strategies
- 1.10 Describe the concepts of marketing and market identification
- 1.11 Explain the nature of channels of distribution

### Subtopic 2: Economics

- 2.01 Explain the concept of economic goods and services
- 2.02 Describe the concept of economic resources
- 2.03 Explain the concept of economics and economic activities
- 2.04 Explain the concept of utility
- 2.05 Explain the concept of supply and demand
- 2.06 Explain the concept of price
- 2.07 Describe the types of economic systems
- 2.08 Explain the relationship between government and business
- 2.09 Describe the concept of private enterprise
- 2.10 Explain the concept of profit in a free enterprise system

- 2.11 Explain the concept of risk
- 2.12 Describe the concept of competition
- 2.13 Explain the concept of productivity

#### Subtopic 3: Communications

- 3.01 Answer the telephone in a business like manner
- 3.02 Explain the nature of written communication
- 3.03 Describe the nature of staff communications
- 3.04 Orient new employees
- 3.05 Explain the use of interdepartmental/company communications

#### Subtopic 4: Human Relations

- 4.01 Set personal goals
- 4.02 Foster positive working relationships
- 4.03 Explain the nature of positive customer/client relations
- 4.04 Handle customer inquiries
- 4.05 Direct customer/client to other locations
- 4.06 Handle difficult customers
- 4.07 Interpret business policies to customers/clients
- 4.08 Handle customer/client complaints

#### Subtopic 5: Mathematics

- 5.01 Make correct change
- 5.02 Calculate miscellaneous charges and discounts for purchases

#### Subtopic 6: Selling

- 6.01 Describe the purpose of selling

- 6.02 Explain company selling policies
- 6.03 Address needs of individual personalities
- 6.04 Use buying motives as a basis of sales presentation
- 6.05 Facilitate customer buying decisions
- 6.06 Explain key factors in building a clientele
- 6.07 Explain the selling process
- 6.08 Open the sales presentation
- 6.09 Questions for information
- 6.10 Probe for information
- 6.11 Suggest product substitutions
- 6.12 Demonstrate product
- 6.13 Demonstrate feature-benefit selling
- 6.14 Handle customer/client objections
- 6.15 Negotiate selling contract
- 6.16 Close the sale
- 6.17 Demonstrate suggestion selling
- 6.18 Describe follow-up techniques
- 6.19 Maintain prospect cards
- 6.20 Obtain product information from sources accompanying an item
- 6.21 Obtain selling information from company promotional material
- 6.22 Obtain product information from appropriate individuals
- 6.23 Process telephone orders

### Subtopic 7: Distribution

- 7.01 Explain the nature and scope of distribution
- 7.02 Describe the receiving process
- 7.03 Explain storing considerations
- 7.04 Maintain inventory levels
- 7.05 Complete inventory counts
- 7.06 Describe the nature of inventory control systems

### Subtopic 8: Marketing Information Management

- 8.01 Describe the nature and scope of marketing-information management
- 8.02 Explain the nature of marketing research

### Subtopic 9: Product Planning

- 9.01 Explain the nature and scope of product planning
- 9.02 Describe the nature of product life cycles
- 9.03 Explain applicable grades and standards
- 9.04 Explain warranties and guarantees

### Subtopic 10: Purchasing

- 10.01 Describe the nature and scope of pricing
- 10.02 Explain the nature of the buying process

### Subtopic 11: Pricing

- 11.01 Explain the nature and scope of pricing
- 11.02 Describe factors affecting selling price

### Subtopic 12: Promotion

- 12.01 Explain the role of promotion

12.02 Describe the types of promotion

12.03 Explain the concept of promotional mix

Subtopic 13: Financing

13.01 Describe the nature and scope of financing

13.02 Explain the purpose of credit

13.03 Facilitate completion of credit applications

Subtopic 14: Risk Management

14.01 Explain the types of business risk

14.02 Describe routine security precautions

14.03 Follow safety precautions

14.04 Describe procedures for handling accidents

Subtopic 15: Operations

15.01 Describe the nature and scope of operations

15.02 Explain functions of business maintenance

Subtopic 16: Career Development

16.01 Conduct a job search

16.02 Prepare a resume

16.03 Write a letter of application

16.04 Complete a job application

16.05 Interview for a job (Billings, Pearson, Wood, & Crossman, 1992).

General Marketing Course Outline

The best curriculum is one that has been designed for a specific situation. If an individual or a class is above-average, the instructor should adjust the curriculum so that

it includes more advanced competencies. Likewise, if an individual or a class is below-average, the instructor should address lower level competencies. Other situations that influence the way the curriculum may be taught are the length of the general marketing program, use of cooperative methods, instructional time per competency and the class scheduling.

The length of the program is an important factor in that some students may be enrolled in one-year programs, while others are enrolled in two-year programs. Students should not enroll in the second year of a program unless they have successfully completed the first year of the program.

Instructors should plan to allocate approximately two hours of instructional time for each new competency. Thirty minutes should be sufficient time to allocate for the review of competencies in two-year programs. Be sure to allow for flexibility with scheduling so that additional time can be spent on certain competencies without creating conflict with the existing schedule.

Listed below are three sample course outlines designed for three different school class schedules. The course outlines are designed for those schools operating on schedules with a sixteen-week grading period, nine-week grading period and a six week grading period. Keep in mind that each one of the course outlines may be adjusted by the teacher to meet the needs of the students, the program being taught and district and state guidelines.

#### 16-Week Grading Period Course Outline:

<u>Week</u>	<u>Subject Matter</u>
1	Basic Marketing Concepts

2	Free Enterprise, World Economies Overview
3	Business Social Responsibility, Domestic Marketplace
4	Fundamentals of Mathematics, Communication Skills
5	Human Relations, Interpersonal Skills
6	Selling
7	Sales Process
8	Closing the Sale, Math for Retail Sales
9	Promotion, Advertising
10	Visual Merchandising, Publicity
11	Distribution
12	Pricing
13	Marketing Information Management
14	Product Planning
15	Financing
16	Careers in Marketing, Finding and Applying for a Job (Farese, Kimbrell, & Woloszyk, 1997, p. T46)

9-Week Grading Period Course Outline:

<u>Week</u>	<u>Subject Matter</u>
1	Basic Business Concepts, Marketing Essentials
2	Economic Essentials, Retail Mathematics



- 3 Sales, The Process Selling, Closing the Sale
- 4 Promotion, Advertising, Visual Merchandising, Publicity
- 5 Human Resources, Communication Skills, Interpersonal Skills
- 6 Buying, Distribution, Pricing,
- 7 Marketing Information Management, Product Planning
- 8 Entrepreneurship, Financing
- 9 Career Planning (Farese, Kimbrell, &Woloszyk, 1997, p. T48)

6-Week Grading Period Course Outline:

<u>Week</u>	<u>Subject Matter</u>
1	Basic Business Concepts, Economic Essentials, Marketing Essentials
2	Selling, The Process of Selling, Closing the Sale, Retail Mathematics
3	Promotion, Advertising, Visual Merchandising, Publicity

- 4 Human Resources, Communication Skills, Interpersonal Skills
- 5 Buying and Distribution, Pricing, Marketing Information  
Management, Product Planning
- 6 Entrepreneurship, Financing, Career Planning (Farese, Kimbrell,  
&Woloszyk, 1997, p. T47)

### General Marketing Teaching Strategies

As a marketing educator, the goal is to help your students gain an understanding of marketing and the role it plays in our economy. There are many ways a marketing educator can teach the general marketing curriculum. This section is designed to give the beginning marketing teacher, some ideas and examples of how the marketing curriculum can be presented in a variety fun and interesting ways. Below is a list of ideas specifically designed to enhance the curriculum:

- A. Incorporate computer technology
- B. Implement cooperative learning
- C. Use alternative assessment
- D. Focus on developing critical thinking skills
- E. Develop and practice academic skills
- F. Integrate multicultural awareness and global marketing
- G. Integrate Ethics
- H. Meet individual needs and special needs (Farese, Kimbrell, &Woloszyk, 1997, p. T20-33)

### Incorporate Computer Technology

As marketing begins to change with the technology boom, businesses focus on implementing technology with the intent enhance business operations. The essential elements of the workplace are experienced, but without its attendant hazards and inconveniences (Price, 1991). Our economic society is rapidly changing from an industrial to an informational-based society (Farese, Kimbrell, &Woloszyk, 1997, p. T20). As a result, the future of students in any marketing career will be touched by computer technology. Here are some ways to enhance the curriculum with technology:

1. Use current events from t.v., online articles, newspapers, and magazines describing how technology has been incorporated with marketing.
2. Introduce your students to technology by planning cooperative learning activities with your school's computer, keyboarding, or accounting teachers. Have your marketing students prepare and present power point presentations.
3. Use technology to conduct research on existing businesses and produce a report on the findings.
4. Incorporate simulations and games on the web to help support the curriculum like J.A. Titan, Virtual Business, and Virtual Stock Challenge.

### Implement Cooperative Learning

The marketing curriculum provides many opportunities for students to learn and apply the skills necessary for positive interpersonal relationships (Farese, Kimbrell, &Woloszyk, 1997, p. T22). By incorporating cooperative learning into your teaching strategies, it will allow your students to work together and focus on the learning of others. Have students work in small groups of mixed-ability and encourage them to share ideas

to complete the task. The cooperative learning strategy will allow the educator to give students the opportunity to build and maintain skills necessary to establish positive interpersonal relationships. Below are some examples of how you can use cooperative learning in your marketing curriculum:

1. Assign students to teams and you the teacher present the lesson to the class as a whole. The teams then work together to make sure all members of the team understand the material.
2. Divide the class into teams and the lesson into separate parts. Assign each group a section of the lesson and allow them to study the material. Have each group design a bulletin board representing their assigned material and have them present it to the class.
3. Have students work together on research projects and have them present in class.
4. Have students work on case studies and role plays in class.
5. Encourage students to work in study groups when reviewing material for quizzes and tests. (Farese, Kimbrell, &Woloszyk, 1997, p. T22-23)

#### Use Alternative Assessments

It is important for marketing educators as well as any teacher to measure the student's progress. The traditional way to assess a student's knowledge of the material being taught is to administer a written test that evaluates a students recall and ability to answer questions about the content being taught. In today's educational environment, however, there is a greater need to assess students through a performance-based

assessment. Quality or performance indicators have suddenly become the nation's barometer of education wellness (Asche, 1990 pp. 3-4).

In addition, students are diverse and have many different learning styles. They have different means of expressing their knowledge and skills of the content being taught. The combination of different learning styles and the need to evaluate student's skills requires teachers to use a variety of methods to assess student's knowledge of the material. Listed are a few ideas of how a beginning teacher can assess their students:

1. Have students engage in a performance assessment such as role-plays, oral presentations, computer applications, or demonstrations.
2. Have students create an employability portfolio with model documents, documents demonstrating marketing competencies, career goals, service and leadership activities, resume, and job application form.
3. Observation and questioning a student is a great way to assess their knowledge of the subject matter. Observe how they interact with other students or work independently. Question students and assess the competence of students and monitor the development of meaningful understanding of concepts.
4. Implement written and oral presentations into the curriculum.
5. Have students participate in self-assessment. At the beginning of the school year have students write down what they think marketing is. As you go through the course, have students report periodically on what they have learned and have them evaluate their own progress in the classroom.

### Focus on Developing Critical Thinking Skills

Today's business environment is highly competitive and demands skilled employees. One of the differentiating factors in achieving success in the workforce is an individual's ability to deal with a variety of demands of the fast-paced business world that require insightful decision making, creative problem solving, and interactions with diverse groups. By teaching students the importance of critical thinking, they are able to achieve success in today's workforce (Farese, Kimbrell, & Woloszyk, 1997). Here are some helpful hints in using critical thinking in the curriculum:

1. Have students compare and contrast, solve problems, make decisions, analyze and evaluate throughout the course.
2. Use open-ended questioning and activities that focus on open-ended problems. This approach will allow your students to answer questions in a safe environment and not have to worry about getting the right answer.
3. Organize your students in cooperative learning groups so they can see how others solve problems, give each other feedback, and try out new ideas.
4. Provide feedback that encourages and promotes thinking at various levels.

### Develop and Practice Academic Skills

All marketing professionals need to know how to write letters, scripts for memos; how to speak professionally, interact effectively with co-workers, and perform basic mathematical functions (Farese, Kimbrell, & Woloszyk, 1997, p. T28). By enforcing basic academic skills in the marketing course, you will be supporting students in completing tasks and roles that will be necessary in their future jobs. Below are some helpful strategies on how to integrate academic skills in the marketing course:

1. Class assignments should include reading class materials in class, write letters and reports, conduct presentations, and perform mathematics exercises.
2. Require students not to turn in written material with no typographical errors.
3. Identify students who need extra help in academic areas. Encourage tutoring, peer counseling, or development courses.
4. Emphasize the importance of academic skills in your classroom and identify for students which academic area they will be using for the lesson being taught.
5. Reinforce academic skills through your assessments.
6. Use a team teaching method with an academic course like English.

#### Integrate Multicultural Awareness and Global Marketing

As future business leaders, students will be faced with a diverse marketplace in which people of many different cultures are both workers and consumers. Students need to understand and value the richness of the cultural heritages of the many people who make up the U.S. population (Farese, Kimbrell, & Woloszyk, 1997). This understanding is important in that it creates a positive working environment for people of all nationalities. It is critical for marketing educators to integrate the curriculum with ethnic content. Listed are a few teaching strategies that will assist in the implementation of events, concepts, and issues from diverse ethnic perspectives:

1. Use current news stories or advertisements to call student's attention to cultural differences that influence the marketing of a product.

2. Assign research projects based on cultural diversity and have the students present the project in class.
3. Have students collect examples, from newspaper and magazine articles, of ethnic diversity and have them write a summary and present it in class.

### Integrate Ethics

During their marketing careers, students will encounter many situations that will require them to make their own decisions. Often, people make decisions before they take in consideration any ethical aspects. However, often in this situation, it is too late to consider the consequences and how the decision will affect the people involved. Helping students learn about ethical behavior and how to consider the effects of a decision before it is made are important topics for your marketing course (Farese, Kimbrell, & Woloszyk, 1997, p. T32). Here are some classroom strategies to use in introducing and implementing ethics into your course curriculum:

1. Collect and share current articles in the newspaper, magazines, or on the internet that portray an ethical dilemma. Have students analyze the situations in class or write a short report on their analysis.
2. Use case studies to model and analyze the issues and the possible actions to take.
3. Break students up into small groups to discuss the case study or issue presented.
4. Have your students participate in role-plays that deal with ethical situations, using their own ideas about how to respond to a given situation.



Discuss class responses to the role-play and guide them into using ethical decisions.

### Meet Individual Needs and Special Needs

One of the greatest challenges for teachers is to provide positive learning experiences for all students. Because each student is unique in the make up of their abilities and needs, the learning styles and physical abilities of your students may vary widely. To ensure that each child is challenged and motivated, you need to present the best learning opportunities and experiences (Farese, Kimbrell, & Woloszyk, 1997, p. T33). This can be done through a variety of activities that match the student's abilities and needs. The diversity of these activities will stimulate student's interests, motivate their learning and facilitate their understanding (Farese, Kimbrell, & Woloszyk, 1997, p. T33). All students, whether handicapped or not, make numerous adjustments or transitions. During the course of their schooling, they must learn to cope with differences in classes, grades, schools, and programs. Ultimately, they must move from the fairly sheltered environment of school into the more competitive world of work (Naylor, 1995).

Some things to consider when teaching a diverse population are:

1. Make sure that the activities assigned match the ability range of all students
2. For students that have mastered the concepts presented, present them with concepts, theories, and allow them to express themselves in a variety of ways such as independent projects.
3. Students with special needs or are physically challenged need to be addressed right away.

# Unit Two

## **Unit II**

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## UNIT II

### INTERGATION OF DECA INTO THE CURRICULUM

#### Introduction

DECA is a student-centered program that focuses on providing high school students opportunities to learn about occupations in the field of marketing.

The focus of the DECA program is on activities that assist in developing a greater understanding and appreciation of marketing, management and entrepreneurship. These activities contribute to occupational competence by promoting greater understanding and appreciation for the responsibilities of citizenship in our private and free enterprise system. (DECA IMAGES, 1996).

DECA is a nonprofit organization that is focused on the student. The national organization is composed of all the state associations. The DECA association is ran by student delegates who are selected by state and the national officer team. DECA is the only student organization operating in the nation's high schools that attracts individuals to the fields of marketing, management, and entrepreneurship. (DECA IMAGES, 1996).

#### Goals of DECA

DECA activities provide members with opportunities to serve in leadership roles, work in teams, and receive local, state and national recognition. Listed below are the goals of DECA:

1. To prepare marketing education students to be successful in the business world.
2. To develop leadership characteristics.
3. To develop self-confidence and self-acceptance

4. To develop a greater understanding of the free enterprise system.
5. To further develop occupational competencies needed for careers in marketing, management, and entrepreneurship.
6. To develop high ethical standards in personal and business relationships.
7. To develop effective international relationships.
8. To develop a greater awareness of career opportunities in marketing
9. To develop greater proficiency in communication
10. To develop greater appreciation of the responsibilities of citizenship
11. To develop social and business etiquette (DECA IMAGES, 1996).

#### The DECA Emblem

The official DECA emblem is a diamond shaped design. Each point of the diamond signifies a working part of the organization. The four points of the DECA diamond are:

1. Vocational Understanding
2. Civic Consciousness
3. Social Intelligence
4. Leadership Development (DECA IMAGES, 1996).

At the beginning of each school year, DECA chapters are provided with the DECA Guide to the DECA Competitive Events Program and additional nationally-sponsored activities, with a catalog of official DECA IMAGES products. Look for these

materials and other publications for students and advisors in your school mail or contact your Vocational Director for assistance.

### Importance of DECA

Most commonly in marketing education, students tend to have common objectives and interests in related occupations. DECA activities have a tremendous effect upon the attitudes of students. DECA members learn to be leaders and have many opportunities for state and national recognition that would not otherwise be possible. (DECA IMAGES, 1996).

DECA chapter activities focus around the students and support student involvement in school activities. The DECA chapter offers opportunities for students to “showcase” their skills through achievement and progress in the business and marketing field. The chapter attracts students who are interested in careers in marketing, management, and entrepreneurship.

DECA is a large contributor to the local community. Many businesses favor employing marketing education students because of their related school study of business and marketing, attitude towards business and leadership skills. Many DECA projects are civic conscious related and the community tends to benefit greatly from these particular projects.

Marketing education and DECA constantly supports and reinforces America’s system of competition and private enterprise (DECA IMAGES, 1996). As DECA attracts more of our nation’s youth to study marketing, marketing education programs become a vital necessity to our national economy.

### DECA Advisor Responsibilities

Because of the co-curricular nature of DECA, the teacher/coordinator is in a position where they can use DECA to enhance the marketing curriculum taught in the classroom.

As stated earlier in the chapter, DECA is a student centered-organization that is run by and for the students. Even though the program is ran by students, a teacher or coordinator must oversee the program and be able to accept the following responsibilities:

1. Initiate the organization of the DECA activities by the chapter.
2. Assist in the process of electing officers and letting each officer know the responsibilities of each office.
3. Provide all members with leadership training.
4. Assist students in establishing adequate DECA chapter records and accounts.
5. Oversee the chapter meetings and make sure they are operated in a business like manner.
6. Encourage new members to join and market the program.
7. Involve all students in activities.
8. Communicate with administration, leadership, and other staff concerning fundraising, field trips, or any other DECA related events.
9. Encourage participation in DECA competitive events.
10. Establish an advisory committee composed of staff, students, parents and community business leaders. (DECA IMAGES, 1996).

## Chapter Development

As a teacher in a marketing education program, systems are already in place to establish a DECA chapter. If properly organized, your DECA chapter will assist you in completing your every day classroom activities, as well as accomplishing your overall goals for your program. DECA's leadership activities and competitive events program will motivate your students to learn and achieve success in the classroom or on the job. The student's motivation gathered from the DECA activities, makes the role as a teacher more exciting and more personally rewarding. A strong DECA program will provide teachers with a teaching tool that can help bring out the best in each student.

Several factors will contribute to the strengthened effectiveness of your DECA chapter. Among these are an enthusiastic and motivated student membership, an interested and willing teacher/coordinator, competent student chapter officers and cooperation from the school and the local business community. These factors will enhance the interest in and participation by all chapter members, leading to a group of students excited about DECA. The following is a suggested format for organizing a new chapter:

1. Generate interest from your marketing students by promotion DECA thorough a web search, publications, presentations from other DECA members in the local area, or any other DECA marketing tools.
2. Submit a proposal to the administration for approval of the chapter.
3. Hold an orientation meeting with prospective students.
  - a) Explain the benefits of a membership
  - b) Address purposes and goals of the organization



- c) Allow students to ask questions
  - d) Discuss and develop a constitution
  - e) Discuss the responsibilities, characteristics and duties of the officers
  - f) Present campaign regulations and election procedures
  - g) Decide on how your state and national dues will be paid
4. Elect officers.
  5. Collect all dues and submit membership roster to your state advisor.
  6. Hold executive committee officer meeting to discuss duties of each officer and how to conduct a meeting.
  7. Develop a program of work.
  8. Set time and location for next meeting. (DECA IMAGES, 1996).

### Developing a Program of Work

Developing a program of work will help the teacher and the DECA chapter evaluate and improve the program. A well-rounded program of student activities must be carefully planned and organized. The most important thing to note is always ask yourself why you are doing the activity. Be sure and have a clear reason or goal for each part of your program of work.

The advisor should initiate the process of developing a plan of action by discussing the options with the students and explaining the importance of a program of work. Not everything can be done and most of the activities cost money so careful planning and budgeting becomes crucial to the program of work.

The first step towards putting a program of work together is to generate a list of scheduled meetings and decided on when and where your chapter will meet. Following, specific committees and individual assignments should be made along with the follow-through plans for each assignment.

The next step in developing a program of work is to review as a chapter the possible activities in which the chapter might participate. Be sure to decide on a few activities that the members agree on participating in. Next, make a list of possible additional activities that the chapter would like to work on.

Begin to appoint a program of work committee for each activity of the program. The committee members will be responsible for setting up a tentative plan that includes goals and processes necessary to carry out each activity. Have each committee report back to the chapter for approval. Be sure to check with administration, leadership and other school officials to ensure that the activity is cleared.

After the program of work has been completed, appoint or elect members to help work on the proposed plan. Be sure to set due dates and schedule meetings to update the chapter on the progress of the activity. After the activity is completed, be sure to review and evaluate. Make suggestions on how the activity can be improved in the future. Be sure to document all meetings, materials designed for the activity, surveys, or any other material that might be helpful in evaluating the activity and improving the outcome.

Chapters can best serve their schools and communities if they provide a variety of activities throughout the year. Your DECA chapter will be rewarded with member satisfaction and enthusiasm if it plans a variety of activities that cover the “DECA Diamond.” Those activities include civic consciousness projects, vocational

understanding projects, projects that develop leadership skills and social intelligence.

Listed are some sample activities that include the four parts of the “DECA Diamond.”

Programs are encouraged to participate in these activities but are not limited to designing their own activities:

#### Civic Consciousness Activities

1. Assist businesses with inventory or surveys, especially during the holidays
2. Participate in a community clean-up project
3. Visit a local children’s hospital or senior citizen’s home
4. Adopt a family and collect food or clothes
5. Participate in a blood drive
6. Present a holiday party for children in the community (DECA IMAGES, 1996).

#### Vocational Understanding Activities

1. Host a career fair for the school
2. Attend DECA and other business related seminars
3. Participate in DECA conferences and competitions
4. Assign student to speak at local civic club meetings such as Kiwanis, Rotary, Eagles and Lyons clubs
5. Schedule outside business speakers (DECA IMAGES, 1996).

#### Leadership Development Activities

1. Participate in local, regional, national DECA events

2. Participate in a DECA or other business related retreat or workshop
3. Host a training seminar for DECA members (DECA IMAGES, 1996).

### Social Intelligence Activities

1. Sponsor a school wide event like a dance, lip sync, fashion show, or talent show.
2. Hold a “back to school” pancake breakfast for staff and administration
3. Host a softball game or some other event that includes current members and alumni members
4. Host an end-of-the year banquet and awards ceremony for DECA members and parents (DECA IMAGES, 1996).

Keep in mind that it is important for chapters not to schedule too many activities during any single month. Activities should be scheduled throughout the school year. This will ensure an active chapter and the involvement of all chapter members. A good rule of thumb for beginning market programs is to set up a monthly calendar and concentrate 2-3 activities per month. Be sure to make changes and substitute any activities to fit your schedule and meet your chapter’s goals.

### Managing Chapter Finances

Although local school policy will usually dictate how chapter finances are to be handled regarding the procedure for depositing and disbursing funds, it is up to the DECA chapter to determine how much money will be raised and for what will the money be used for (DECA IMAGES, 1996). It is crucial that the teacher/coordinator of the

DECA chapter familiarize themselves with the policies and procedures set forth by the school. It is recommended that the teacher/coordinator establishes a strong working relationship with the fiscal clerk of the school and the school district fiscal clerk. Many of the DECA activities require fees and often need to be paid by a certain deadlines.

One of the first things a chapter must do is develop a budget. The budget is designed to show the chapter the estimated amount of money the chapter will need to carry out its intended activities and must be in line with the amount of income projected from the chapters fundraising activities (DECA IMAGES, 1996). Planning the budget should take place while committees are meeting and discussing what activities the chapter is considering for the year's program of work. This will enable chapter members to see if the chapter can afford to participate in the activities.

It is important for the chapter to consider the how much money can be raised and what the process will be. Before planning any fundraising activities, chapters must determine how the income is going to be raised. It is suggested that the teacher/coordinator first check with administration, leadership team, or fiscal clerk to receive clearance to participate in the fundraising event. (DECA IMAGES, 1996).

#### Chapter Officer Responsibilities

The strength of a DECA program is only as strong as it's team of officers. With a strong group of officers, the chapter can be run in an effective manner. The teacher/coordinator should highly encourage students that are voting for chapter officers to use good judgment and focus on the qualifications of each participant. Officers that

have been nominated should be those that will work hard and possess strong leadership skills. Listed below are the suggested officer positions and their general responsibilities:

#### Chapter President

1. Handles chapter meetings in a parliamentary order, Keeps meetings to its order of business and sees that time limits are honored
2. Represents the chapter at special DECA and school events.
3. Coordinates and guides the efforts of all chapter officers.
4. Consults regularly with the chapter advisor on the chapter's program of work.
5. Determines the need and calls for necessary meetings.
6. Promotes the chapter through their own enthusiasm for DECA
7. Conducts himself/herself in a manner that reflects the chapter and school as a whole. (DECA IMAGES, 1996).

#### Chapter Vice President

1. Assists the president in the discharge of his/her duties and responsibilities.
2. Presides over chapter and executive committee meetings in the absence of the president.
3. Assumes full responsibilities and duties of the president should he/she be absent for a long period of time or leave the chapter permanently.
4. Serves as a member of chapter committees
5. Promotes the chapter through their own enthusiasm for DECA

6. Conducts himself/herself in a manner that reflects the chapter and school as a whole. (DECA IMAGES, 1996).

#### Secretary

1. Takes notes and prepares adequate minutes of each chapter meeting.
2. Answer all incoming chapter correspondences.
3. Keeps a proper file of all DECA correspondences and any other information regarding the chapter.
4. Prepares all chapter records
5. Responsible for posting items of common interest or concern of the chapter.
6. Reads letters or other communication items at meetings.
7. Is prepared at every meeting with pen and paper. (DECA IMAGES, 1996).

#### Treasurer

1. The treasurer is responsible for all financial transactions in and out of the chapter account.
2. Assists in the preparation of a statement of estimated receipts and expenditures for the year.
3. Keeps financial records neat, accurate, and up-to-date.
4. Responsible for collecting dues, fundraising or any other moneys.
5. Pays out funds on authorization of the chapter.
6. Helps plan and execute the ways and means of raising income.
7. Prepares balance sheet to be presented at chapter meetings.

8. Serves as an official chapter member (DECA IMAGES, 1996).

#### Parliamentarian

1. The parliamentarian of the DECA chapter is responsible for being knowledgeable about parliamentary procedures, and for ensuring that proper parliamentary procedure is followed at all chapter meetings
2. Advises the presiding officers and other chapter members on the points of parliamentary procedure during meetings.
3. Recognizes and calls the chair's attention to significant irregularities in procedures. (DECA IMAGES, 1996).

#### Reporter

1. Sends chapter news and happenings to the state reporter and to the National DECA office.
2. Prepares articles for publication in the school and local newspaper.
3. Keeps a cumulative file of clippings, articles, pictures and copies of special programs. (DECA IMAGES, 1996).

#### Historian

1. Produces (with the help of fellow members) a scrapbook or manual of all chapter events and activities of the current year. Videotapes can be made as well.
2. Works closely with the secretary and reporter on chapter activities by sharing ideas, notes, and other data.



3. Keeps accurate records of all events. (DECA IMAGES, 1996).

### National DECA Week

National DECA Week is a great way for your chapter to promote DECA and what your program is doing at your school. National DECA Week is always celebrated during the second full week of February (DECA IMAGES, 1996).

National DECA Week is a program designed to promote DECA throughout the nation. The key to a successful promotion of National DECA Week is to utilize good management principles such as planning, organization, staffing, and delegating duties. When writing your list of activities that your chapter is planning, it is common practice to use a checklist format to easily mark off each activity as you complete it. Here are a few simple steps to follow in planning your National DECA Week Promotion and some suggestions of activities:

1. Plan early and prepare a weekly calendar.
2. Select an overall chairperson and a strong committee.
3. Make detailed plans of what types of activities your chapter wants to participate in.
4. Contact National DECA for items and materials that might help you with your promotional efforts.
5. Contact civic organizations and have a small group of members make a presentation on DECA.
6. Design a bulletin board or display at your school that represents National DECA Week.

7. Sponsor a motivational speaker, possibly someone who has achieved great success and was a part of DECA when they attended high school.
8. Hold an advisory committee or employer appreciation breakfast. (DECA IMAGES, 1996).

### DECA Conferences

DECA members have the opportunity to participate in many conferences throughout their years of membership. These conferences provide learning experiences based on the four points of the DECA Diamond (civic consciousness, social intelligence, vocational understanding, and leadership development). There are many different conferences offered throughout the year. Generally there are local, state, regional, and national conferences. Advisors should check with their state DECA advisor or the state supervisor for marketing education to determine what conferences listed.

### DECA's Competitive Event Program

The DECA Competitive Events Program is a great way to allow students to apply what they have learned in the classroom in a real life situation. The DECA Competitive Events Program is used by students to demonstrate what they have learned in the classroom and how it relates to business and industry through case studies, tests and role plays.

The competitive events are designed to enable students to engage in activities that will extend their interests and competencies for careers in marketing and measure the degree to which competencies have already be acquired. The competitive events meet

the goals of marketing education curriculum by demonstrating occupational proficiency in specific areas of marketing, management, and entrepreneurship.

DECA's Competitive Event Program format starts at the local level, continuing at the state level and finally ending at the national level. Students first compete in their local or area competition. Depending on the allocation issued by National DECA, the top winners in the area event will then compete in the state competition. The same format follows and students in the top positions carry on to the national competition. As DECA's competitive event program propels winners from the local, to state levels, and finally to the national level, the success, confidence, recognition and awards that students earn in the program are crucial to their success in marketing careers.

More than 60 major corporations and organizations support DECA's Competitive Event Program through sponsorship and scholarships as well as active involvement in the preparation and administration of the competitive events (DECA IMAGES, 1996). Teachers/coordinators should check with their state advisor for the most current competitive events list and calendar of competitive events.

# Unit Three

### **Unit III**

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## SECTION III

### THE STUDENT STORE

#### Introduction

The student store is designed to provide students with the opportunity to take the skills learned in the classroom and utilize them in a laboratory setting. It is important for any new Marketing Education Program to include a Marketing Education Laboratory. The student store allows students to gain experience in cash register operation, retail operations, inventory, customer service, advertising, merchandising, sales, marketing research, and purchasing. It is important that the students take ownership of the student store and complete the tasks necessary to make the business effective and efficient. The student store program is staffed and managed by the advanced marketing students and students in the beginning marketing classes. Other program areas such as special education and business education may work with the marketing advisor and the marketing classes to place students in the lab. This offers a great opportunity for the marketing students to learn the process of employee training and monitoring staff. The students are to perform all staffing and management functions including the accounting to the ASB of all receipts, inventory and daily business.

The responsibility of the advisor is to over see the store and make sure that all of the store operations run smoothly and efficiently. It is critical that the advisor establishes a clear set of operations in order for the students to complete the duties without errors. A great way to make sure that all students clearly understand the operations of the store is to design an operations manual that can be used by the marketing students. Advisors can develop lesson plans and assignments from the manual for students to complete.

Advisors can use these assignments as well as role-plays and demonstrations to assess the student's ability to complete the store operations. Below is a sample operations manual that can be used as a guide in developing your own to fit your needs. Be sure and check with your fiscal clerk to learn the ASB rules before developing your operations manual.

### Sample Operations Manual

The student store positions should be divided up in such a way that all students have the opportunity to gain experience in the different aspects of running a business. First, students should be assigned to positions that best fit their experience and knowledge of basic retail operations. As the students master the competencies required for each position, they then train the next student in line to work in that particular position. It is common practice that the advanced marketing students take on the managerial positions and the beginning students start at the basic customer service positions. Below is a list of staffing positions and their responsibilities:

1. General Store Manager: The duties of the general store manager are to oversee the entire operation of the student store. The student is responsible directly to the faculty advisor. It is advisable that the store manager works during the store operating hours and be enrolled in one of the marketing classes. The following are specific duties of the general store manager.
  - a) Review all reports and see that they are properly and accurately completed.
  - b) Review all purchases and inventory levels seeing that they are at an acceptable level.
  - c) Review all deposits.

- d) See that the store files and the control sheets are kept properly.
- e) Go over the ASB records periodically and see that they are in balance with the student store.
- f) Supervise the weekly inventory count and tabulation.
- g) Make certain that store policies and rules are being followed.
- h) Report any serious violations of store policy to the advisor.
- i) Hold weekly meetings with the management staff to review reports and develop a plan for the week.
- j) Supervise other management staff and assist in making management decisions.
- k) Delegate management responsibilities as appropriate, coordinating with the faculty advisor.
- l) See that the store is properly cleaned, supervised and managed.

2. Store Controller: The store controller will work with the general store manager in carrying out the management of the store. The store controller's specific duties are as follows:

- a) See that the daily deposit is made and that it is correctly recorded. Make certain that good cash control is followed in the store and that the cash receipts are properly secured in the store safe.
- b) Find any discrepancies on the report and report these to the general manager and the advisor.
- c) Record and take all invoices to the fiscal clerk daily.



- d) Check the accuracy of all invoices to include count, extensions, totals, tax and other charges.
  - e) Make certain that shift managers and staff receive reports on the accuracy of their tills and business on a regular basis.
  - f) Make certain that all information on the daily deposits is recorded on the correct controlling forms and on computer records.
  - g) Keep accurate records of staff time cards.
  - h) Report any serious violations of store policy to the advisor.
3. Shift Manager: The shift manager will be responsible for all the activities in their shift including control, housekeeping, receiving, and store ordering. Their specific duties include the following:
- a) Manage the staff assigned to them and schedule staff.
  - b) Supervise the counter and control all activities at the counters.
  - c) Justify business in the tills by checking the till count and report any discrepancies to the advisor.
  - d) Supervise the cleaning and appearance of the store during the shift.
  - e) Verify any paid outs or till concerns.
  - f) Receive stock when it is delivered during their shift.
  - g) See that the correct amounts of prepared food is made during their shift.
4. Merchandise Manager: If the advisor chooses to have a merchandising manager, the merchandising manager will be responsible for the following:

- a) Order all stock.
  - b) See that all racks and shelves are properly merchandised and displayed.
  - c) See that the store is displayed seasonally and whenever there is a need.
  - d) See that the merchandise is properly received and accounted for.
  - e) Make certain that merchandise is properly stored
  - f) See that there is no expired merchandise on the floor or in inventory.
  - g) Assist the general store manager, the store controller and the shift managers as assigned.
  - h) Act as a support staff manager and supervise staff workers when necessary.
5. General Staff: All students assigned to the student store as a staff employee will be assigned to a particular shift and specific duties. Store staff are expected to know how to run tills, clean, work with prepared foods, merchandise and complete all of the other tasks assigned. All staff workers are expected to follow the instructions of their shift managers, the general store manager, the controller and merchandise manager when assigned. Specific duties of the general staff include:
- a) Customer service and assisting other staff.
  - b) Handling cash and operating the till.
  - c) Handling food and serving customers.
  - d) Cleaning and merchandising when needed.

### Business Hours

It is suggested that the student store be open before school (15 minutes prior to the start of class), and at lunch. The store should be officially closed at the first warning bell and no sales shall be made after that bell. This allows students enough time to get to class. The store shall remain closed during the rest of the school day unless the advisor allows the store to be open at the end of the school day (15 minutes after the dismissal bell).

### Receiving

All merchandise received in the store must be counted by a physical count by one of the store managers or designated students. A copy of the invoice must be kept and placed in the Accounts Payable box for payment. The staff person who received and counted the merchandise must sign and be able to verify that the invoice and the actual physical count were accurate. The invoice must also be signed by the advisor.

All merchandise must be received while a store manager is present and during hours when the store staff is present. Deliveries made after the store is closed and the staff are gone should not be received. The store should not acknowledge receipt or be liable for merchandise unless it is properly received by the store staff. All merchandise must be stored and secured in the proper storage area after it is received. No extra merchandise shall be left on the floor.

### Paying of Accounts

The store controller will be responsible for seeing that all accounts are processed to the fiscal clerk in a timely manner. All accounts are paid by purchase order under the

direction of the schools fiscal clerk office in keeping with Washington State law. No accounts will be paid for by cash or C.O.D. The following processes should be used in processing billings and invoices:

1. Each invoice shall be signed by the person responsible for checking the merchandise in.
2. The invoice will be placed in the accounts payable file.
3. The controller will record the information on the invoice to include the amount, the date received, the date processed to the fiscal clerk for payment and the vendors name and invoice number on the account log.
4. A copy of the invoice will be made and placed in the store file under the individual vendor's file. The original will be taken to the fiscal clerk for payment.
5. When the fiscal clerk has acted a copy of the ASB requisition, a copy will be stapled to the store invoice and placed in the vendor's file.
6. Each quarter the account log will be totaled with the inventory.

#### Credits

Credits will be handled in the same fashion as the invoices for payment. A copy will also be kept in the store file under the individual vendor's file.

#### Vendors

All vendors or companies desiring to sell to the student store must follow the school district policy and practices. This includes submitting bids when called for and

receiving approval to vend to the student store. All vendors wishing to sell to the student store must make contact with the school store advisor and should be encouraged to make presentations to the store staff.

### Handling Cash

All cash and monies received for merchandise in the store must be received according to acceptable practices. All money must be received into the cash registers. There shall be no “behind the counter” sales. All sales must take place over the counter and received immediately into the cash register. This does not include transfers into the school store accounts from the ASB.

The staff shall follow a “one person per till” policy. Each person assigned to a till will be responsible for the change fund and for the balance of the till. Only the shift managers and the faculty advisor will have access to a till which has been assigned to a student. Should another staff person be required to operate a till, the till will be cleared, counted, and the change fund replenished. Any person violating this policy will be removed from the store. No staff person, including the management will ring up their own purchases. There shall be no purchasing or consuming of stock while on shift.

Each machine will be set up with a change fund of \$25.00 at the beginning of the shift. This amount includes \$15.00 in cash and the rest in coin. Each person assigned to the till will check the change fund at the beginning of their shift to account for the accuracy. If there is a discrepancy, the shift manager shall be notified.

Staff will practice a “one customer at a time” policy. No one will “hold” money from one transaction to be added to another one. Each transaction will be conducted as an individual transaction. It will be concluded before the next customer is waited on.

Checks will be taken only upon approval for the advisor. Shift managers may be instructed and may, with direction from the advisor, authorize and take checks for purchases. All receipts are to be counted daily and all cash except for the change fund will be taken to the fiscal clerk the following class period. The till change funds will be locked in the school store safe.

### Cash Registers

All money received in the school store must be properly processed through the cash registers. The following policies are expected to be followed on a daily basis in the student store in regards to the cash register:

1. One person per till per shift.
2. One order/customer at a time.
3. No holding money for a later ringing.
4. No grouping of orders
5. Always have a journal or detail tape active in the machine.
6. Always have a receipt tape when clearing or “Z’ing” the machines.
7. All over rings or paid outs will be verified and initialized on the journal tape by the shift manager.
8. No eating or drinking at the tills or behind the counter at anytime.
9. No one shall ring up their own orders.

10. Staff will not mix personal money in any way with the cash registers. This means purses, wallets, pocket money, or other means of keeping personal money will be kept away from the registers.
11. Shift managers and operators are both responsible to see that the policies are followed.
12. Each operator is responsible for cleaning and keeping their work area neat.

#### Accounting Procedures For Daily Receipts

Each till is counted and cleared after each shift by a designated staff person. Each machine must be "Z'd". The Controller shall take the money from each till from all shifts and verify each bags count and will record any shortages or overages on the correct close-out form. The amount of the money to be deposited will be recorded and the register reading will be recorded on the cash register report summary form. The Controller will make a grand total count and prepare a daily proof of cash form and then will take the cash to the fiscal clerk office to be deposited. The receipt from the fiscal clerk office will be attached to the cash register report summary and the daily proof of cash form along with the register journal tapes. The Controller will file these forms in the student store file. The deposit information will be recorded on the daily deposit log.

#### Counter

Only designated staff workers are to be behind the counters. The store is not to be used for any social gatherings. There will be no loitering or visiting behind the counter. If a staff person is on shift, they are to be working and not visiting over the counter with

friends. If there are no customers, staff shall clean and stock merchandise as needed.

Non staff persons will be allowed to come behind the counter to purchase items in a “self service’ fashion. When staff purchase items they will be treated like any other customer.

### Sales

Everyone will pay regular retail price for merchandise purchased from the store. Discounts are not given unless authorized by the advisor. Any staff person found discounting or giving away merchandise will be referred to the appropriate administrator for discipline and will be removed from the store. Dishonesty will also result in loss of credit for the course.

### Theft and Shrinkage

Dishonesty in any form will not be tolerated in the store. Students must know that they will lose credit and will be subject to appropriate discipline for dishonesty in the school store. The store does not give merchandise away to staff people for working in the store. While incentives may be considered for consistently balancing tills and for special promotions there is no “pay’ for working in the store. The store is the class lab activity for students enrolled or assigned to the program. The compensation student’s receive is in the experience and class credit they receive. You will find as an advisor that your students will love to work in the store and relish the opportunity to gain valuable experience.



### Student Store and ASB

The school store is operated by the Marketing and DECA programs and by definition is an ASB function. All money received by the school store is handled through the ASB as authorized by Washington State laws. The school store will negotiate an annual agreement with the ASB to share the profits of the store. It is the practice of the program to run the school store as a profitable free enterprise business to afford the students the opportunity to gain valuable vocational marketing experience and learn the profit motive.

### Pricing Merchandise

Pricing of merchandise is determined by the general manager and the program advisor. The pricing policy of the store shall be competitive and on par with the general market for the specific items being sold. Each year the prices will be set accordingly to the cost of the items, competition and the market value.

### Stock

All stock in the backroom of the store should be in the appropriate place and department. Partial cases and cases that are opened must be stocked on the display or selling shelves. Only full cases may be kept in stock.

### Store Equipment

All store equipment must be cleaned regularly. This includes refrigerators, freezers, counters and display cases. No one is to abuse store equipment. Any student

who willfully abuses or damages store equipment or fixtures will be liable for the replacement or repair expenses. It will be the duty of the supervisors to train their staff on the proper maintenance and use of equipment.

### Cleaning

It is the responsibility of all staff to keep the store neat and clean. The supervisor of each shift is responsible to make sure that the store is clean and ready for business prior to the beginning of their shift. It is the responsibility of each shift to clean up after themselves. All counters, sinks, tables, ect. must be cleaned daily. Food and drink machines shall be cleaned as directed. The floor shall be swept daily as well.

### Food Handling

All staff will be required to obtain a Washington State Food Handler's card from the Department of Health. Call your local agency to set up a time for the agency to come and speak to your class.

### Files

Files will be kept daily and maintained by the Store Controller. There will be a file kept for each vendor which will include all invoices, payments, credits and other necessary information. Other files that shall be kept include daily deposits, credit accounts, short/over reports and other files as deemed necessary. In addition to the files there will be a daily deposit log, an account log and a short/over log. Each staff person

will have a personal log that includes their time card and a record of store activity.

Access to the files except for the staff file will be restricted to management personnel.

### Personnel

Personnel will be defined as any staff person assigned to work in the student store. Each staff person shall have a personnel file. The file will have a master sheet that will record their attendance and log their daily activity. Each weekly time card will be filed in the student file. There will also be evaluation rating sheets and other information as assigned to be included in the file. No personal information will be included in the student's file.

## CHAPTER 5

### SUMMARY, CONCLUSION, AND RECOMMENDATIONS

#### Summary

The purpose of this project was to design and develop a Resource Guide for Seattle School District Beginning Marketing Teachers. To accomplish this purpose, a study of current literature, State curriculum guidelines, National DECA guidelines and Seattle School District guidelines and policies were taken into consideration. In addition, a review of sample handbooks from other school districts including Highline School District, Renton School District and Issaquah School District was conducted.

The Resource Guide for Beginning Marketing Teachers was developed to accomplish the following goals:

1. To improve instructional techniques in the classroom, curriculum content, and teacher/student assessment.
2. To promote the opportunity for staff and students to grow professionally and personally through DECA.
3. Guide beginning marketing teachers in the process of operating a student store effectively and legally within school and building policies.
4. Assist teachers in connecting their students with industry professionals through work-based learning.

### Conclusions

The conclusions reached as a result of this project were:

1. A well written Resource Guide for Beginning Marketing Teachers is an effective way for beginning marketing teachers in the Seattle School District to locate important information, policies and teaching strategies.
2. A Resource Guide for Beginning Marketing Teachers in the Seattle School District provides a structure for teacher and advisor instructional and professional development.
3. A well written Resource Guide for Beginning Marketing Teachers is an effective way to ensure that beginning marketing teachers have the tools and assistance needed to establish a link between students and business professionals.
4. A well written Resource Guide for Beginning Marketing Teachers offers assistance and presents the opportunity for beginning marketing teachers and their students to participate in DECA.
5. A Resource Guide for Beginning Marketing Teachers in the Seattle School District will assist in maintaining balance and cohesiveness among the programs in the district.
6. Commitment by the teacher/ advisor in the marketing/DECA program is the most significant determinant of the program's success.

### Recommendations

As a result of this project, the following recommendations are made:

1. Resource Guides for Beginning Marketing Teachers should be typed clearly, concisely and continually updated by staff, DECA advisors and vocational directors.
2. The Resource Guide for Beginning Marketing Teachers should include the three main components of a marketing/DECA program:
  - a. Curriculum
  - b. DECA
  - c. Student Store
3. Resource Guides for Beginning Marketing Teachers should be presented to new teachers at the beginning of the school year through a professional training program conducted by Vocational Directors and experienced marketing teachers/DECA advisors. Evaluation should follow to ensure accurate assessment of the resource guide.
4. Resource Guides for Beginning Marketing Teachers should be unique to the school district and for which they are written.
5. The development of a Resource Guide for Beginning Marketing Teachers should include input from the school districts vocational director, advisory committee members, State DECA advisors, building administration and experienced marketing teachers/DECA advisors from the district for which they are written.

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