

# *Cooperative Education Policies and Procedures Manual*

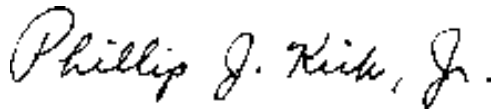
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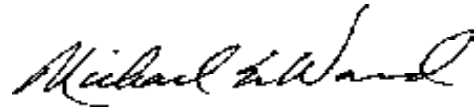
## Foreword

Cooperative Education has been a widely utilized work-based method of instruction in North Carolina for more than sixty years. This instructional strategy can be invaluable in allowing students to gain entry-level skills in the career area of their choice. Cooperative education students have the opportunity to apply the skills learned in academic and workforce development education courses when participating in this method of instruction. Additionally, cooperative education empowers students to be responsible, ethical, and productive employees, therefore teaching them to be good citizens in the society they will soon lead.

Maintaining quality Workforce Development Education programs is imperative in preparing students to be the leaders of tomorrow. Build excellence in your schools using this instructional work-based learning method.



Phillip J. Kirk, Jr. Chairperson  
State Board of Education



Michael E. Ward, State Superintendent  
N.C. Department of Public Instruction

## *Acknowledgments*

This manual has been developed to improve the quality of cooperative education in our public schools and ensure compliance with federal and state legislation authorizing cooperative education as a method of instruction. The State Board of Education has also adopted the policies in this guide to ensure quality in workforce development programs utilizing this instructional method. Additionally, State Board of Education policies have been adopted for the two other forms of work-based learning which may receive credit: high school apprenticeship and internship.

We appreciate the input we received through surveys and questionnaires from all of North Carolina's Workforce Development Administrators as well as the input we received from the teachers utilizing this methodology.

Jeanne Hunt and Carol Rainwater of Charlotte-Mecklenburg Schools were instrumental in the development of the Management Guide for Teacher-Coordinators found in this manual. Their work creating connecting activities for marketing education students is outstanding.

We gratefully acknowledge the following school systems for sharing documents to aid in the development of this guide.

Cabarrus County  
Guilford County  
Charlotte-Mecklenburg County  
Surry County

Additionally, we would like to thank the following Workforce Development Education Regional Coordinators for their input in the development of this manual.

Horace Robertson  
Melinda Lassiter  
Greg Gift

Willie Randolph  
Shirley Ray  
Danny Hardee

The standards represented in this manual will ensure that cooperative education maintains a high level of expectation and integrity for all participants in the cooperative method of instruction. Your involvement is crucial in building programs and providing this hands-on strategy to students.

June S. Atkinson, Director  
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Marketing Education

***North Carolina State Board of Education Policies  
for  
Work-based Learning Methods Receiving Academic Credit  
and  
Federal and State Legislation Authorizing Work-based Learning***

***Adopted June, 2000  
Public Schools of North Carolina  
State Board of Education  
Department of Public Instruction***

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## ***Standard Operating Policies for All Work-based Learning Methods Receiving Academic Credit***

- Students receiving academic credit for work-based learning experiences must participate in one of the following forms of work-based learning:
  - 1) High School Apprenticeships in which students are officially registered through the Department of Labor
  - 2) Cooperative Education through an appropriate workforce development education course
  - 3) Internships connected to course work in the North Carolina Standard Course of Study (paid or unpaid)

*Other work-based learning experiences do not receive academic credit.*

- Students participating in high school apprenticeships, cooperative education or internships (paid/unpaid) will earn academic credit based upon the number of hours spent in the workplace and required projects (similar to senior projects/portfolios). *Local Education Agencies may increase the hourly requirements consistently for all forms of work-based learning.* Policy, on the minimum number of hours required, is provided in the chart below.

<b>Schedule</b>	<b>On-the-job/Work-based Experience Required</b>	<b>Credit Earned for Work-based Component</b>
<b>4 x 4 Block (Semester)</b>	135	1 Carnegie Unit
<b>A-B Day (Year-long)</b>	135	1 Carnegie Unit
<b>Traditional (Year-long)</b>	150	1 Carnegie Unit

- Work-based learning experiences must be documented on a student's Career Development Plan to ensure that the student is placed according to his/her career goals.
- Students receiving credit for work-based learning methods of instruction must complete an official agreement among the school, business partner, student and parent/guardian stipulating the requirements and responsibilities of all involved.
- Students desiring to earn academic credit for work-based learning experience outside the academic year must follow the same policies and guidelines required during a regular school year.
- Students cannot receive academic credit by providing school services such as bus driver, cafeteria worker, office assistant, or teacher assistant.

- Schools shall not allow early work release during the school day for students participating in any other forms of work experience, such as a part-time job, unsupervised by the school.
- Multiple academic credits may not be given for the same work-based experience. *For example, a student cannot simultaneously receive academic credit for any two forms of work-based learning.*

### ***Requirements for Apprenticeship***

High school apprenticeship must follow all guidelines determined by Administrative Code, State Law, and Federal Law, as well as the following:

- X Registration by the Department of Labor, Bureau of Apprenticeship and Training.
- X Standards of Apprenticeship by which each program operates. These standards are adjusted to meet the needs of each employer.
- X A work process, which is a document that lists all the skills an apprentice will be learning and the number of hours required for each skill during the course of the experience.
- X A schedule of related instruction listing all related courses that must be completed by the apprentice.
- X A progressive wage scale must be followed for the apprentice, increasing as the skill levels of the apprentice develop.

### ***Requirements for Cooperative Education***

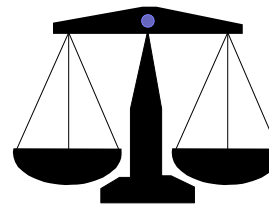
- Students must be enrolled in a workforce development education (vocational and technical education) course offering the cooperative method. The following five program areas offer the cooperative education method of instruction:
  - 1) Agricultural Education
  - 2) Business Education
  - 3) Family and Consumer Sciences Education
  - 4) Marketing Education
  - 5) Trade and Industrial Education
- A signed training agreement must be on file for each cooperative education student. This agreement must outline the responsibilities of all parties involved.
- A training plan must be developed for each cooperative education student.
- Classroom instruction and coordination activities must be provided by a licensed teacher in the content area.
- Teacher/coordinators must be provided twenty-five minutes per week per student for the coordination of cooperative education activities. Extended contracts may be used to provide the required time needed to complete this function.

- Students who would like to continue to earn academic credit for their cooperative work-based experience in the school term following a successful classroom experience may do so during the *same academic school year (summer, fall, spring)*, provided:
  - The teacher-coordinator approves the student as a cooperative education placement for the school term.
  - A teacher-coordinator is available to provide coordination of work-based learning.
  - All coordination policies are followed.
  - A training agreement is on file for the student.
  - The student is following a progressive training plan.

### ***Requirements for Paid or Unpaid Internships***

- X All interns must be supervised by a licensed teacher who has an appropriate background for creating placements and supervising interns.
- X A written agreement must be developed among the school, student, parents and the participating business describing the responsibilities of all parties. This document must be signed by all parties involved and maintained on file. Each party must have a copy of this document.
- X A written program of work must be developed for each intern, outlining the goals of the internship, the competencies to be mastered by the intern, and the strategies to be employed to achieve the goals of the internship.
- X At the completion of the internship, each intern must submit a written report/project documenting the competencies gained through the experience. The school and the participating business must evaluate the project to make a collaborative decision concerning the intern's grade for the internship experience.

## Legislation Authorizing Work-based Learning



### *Federal Law*

- ***Carl D. Perkins Vocational Technical Education Act of 1998:***  
The Perkins Act of 1998, also known as Perkins III, is the authorizing legislation providing federal funds to local education agencies utilizing the cooperative method of instruction. Perkins III authorizes and supports cooperative education by requiring schools to:
  - ✓ Recognize the definition of Cooperative Education
  - ✓ Further develop the academic, vocational and technical skills of vocational students through high standards
  - ✓ Link secondary and post-secondary vocational programs

### *State Law*

#### *Public School Laws of North Carolina*

- ***Chapter 115C of the General Statutes of North Carolina***  
***Article 10. Vocational and Technical Education.***  
***115C.154. Duties of the State Board of Education.***
  - (5) A professionally and occupationally qualified staff is employed and organized in a manner to assure efficient and effective State leadership for vocational and technical education. Provisions shall be made for such functions as planning, administration, supervision, personnel development, curriculum development, vocational student organization and coordination research and evaluation, and such others as the State board may direct.
  - (9) Appropriate minimum standards for vocational and technical education programs, services and activities shall be established, promulgated, supervised, monitored and maintained. These standards shall specify characteristics such as program objectives, competencies, course sequence, program duration, class size, supervised on-the-job experiences, vocational student organization, school-to-work transition programs, qualifications of instructors, and all other standards necessary to ensure that all programs conducted by local school administrative units shall be of high quality, relevant to student needs, and coordinated with employment opportunities.
- ***115C.154.1. Approval of local vocational and technical education plans or applications.***  
Local programs using the cooperative workforce development education (vocational and technical educational) method will be approved subject to students enrolled being placed in employment commensurate with the respective program criteria.



*Cooperative Education Policies and  
Procedures Manual*

*Management Guide for Administrators*

**Policies adopted by the State Board of Education  
June 2000**

**Public Schools of North Carolina  
State Board of Education  
Department of Public Instruction**



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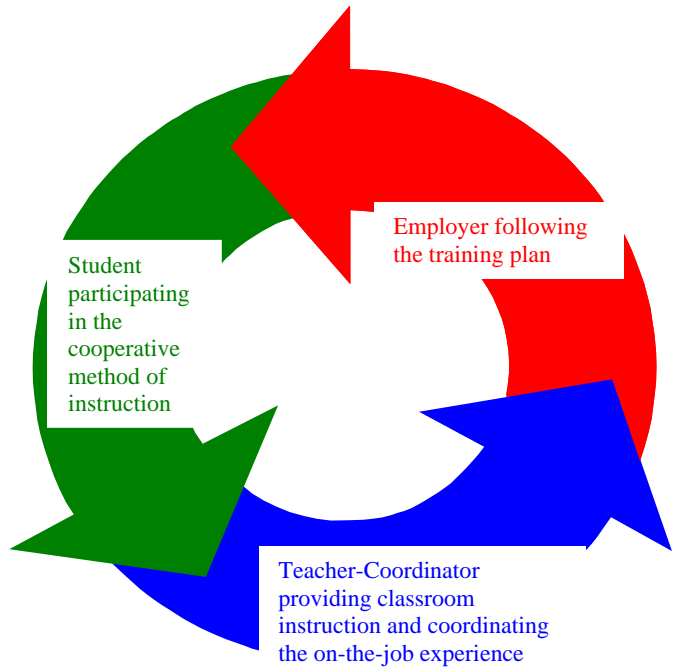
# Overview of Cooperative Education

## *Mission Statement*

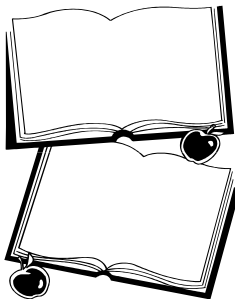
*The mission of cooperative education in North Carolina is to provide relevant learning opportunities to students by connecting classroom instruction and on-the-job training related to their career objectives.*

## What is Cooperative Education?

- Cooperative education is a method of instruction where workforce development education instruction is combined with paid employment directly related to classroom instruction.
- The two experiences must be planned and supervised by both the school and the employer so that each contributes to the education and employability of the student.
- Written cooperative arrangements, showing the instruction to be provided, are jointly developed by the school and the employer/training supervisor.
- Credit is earned for both the classroom and the on-the-job training components.



## Requirements of Courses Utilizing the Cooperative Method of Instruction



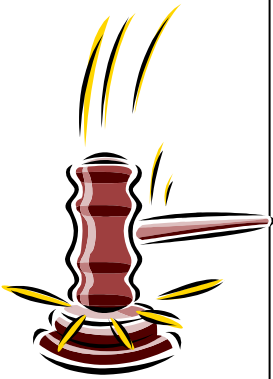
The cooperative method of instruction provides students enrolled in workforce development education courses an opportunity to extend their employment preparation beyond the walls of a classroom. Critical to the philosophy of this instructional method is that students combine classroom instruction and on-the-job training directly related to each other. Both the school and community businesses assume responsibility for helping a student attain competencies required when using this method of instruction. The following five program areas offer the cooperative education method of instruction.

- Agricultural Education
- Business Education
- Family and Consumer Sciences Education
- Marketing Education
- Trade and Industrial Education

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## What components must be in place to offer the cooperative method of instruction?

- ☑ Counselors and teachers provide guidance in helping students choose courses to meet their tentative career objectives.
- ☑ A teacher licensed in the content area coordinates classroom instruction and on-the-job training.
- ☑ A signed training agreement is on file at the school and the training station of each student.
- ☑ Training plans are developed and followed for each student.
- ☑ Students develop competence beyond general employability skills.
- ☑ There is correlation and evaluation of classroom and on-the-job training.



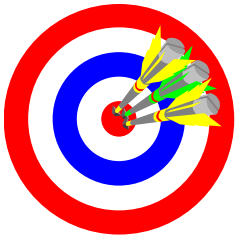
### **Fair Labor Standards Act: Exemptions From Hazardous Occupations**

The provisions of this law require the student-learner to be enrolled in a course of study and training in a cooperative vocational training program under a recognized State or local educational authority. The student-learner must be employed under a written agreement which provides:

- 1) That the work of the student-learner in the occupations declared particularly hazardous shall be incidental to the training;
- 2) That such work shall be intermittent and for short periods of time, and under the direct and close supervision of a qualified and experienced person;
- 3) That safety instructions shall be given by the school and correlated by the employer with on-the-job training; and
- 4) That a schedule of organized and progressive work processes to be performed on the job shall have been prepared.

Each such written agreement shall contain the name of the student-learner, and shall be signed by the employer and the school coordinator or principal. Copies of each agreement shall be kept on file by both the school and the employer.

## How do schools decide which programs to offer?



- A school must decide what programs to offer based upon:
- ⇒ employment opportunities,
  - ⇒ student demand, and
  - ⇒ available training stations in the community.

While students may benefit from working part-time, the purpose of cooperative education is not to provide students with part-time jobs. The purpose is to help students develop occupational competencies related to classroom instruction as they prepare for meaningful employment in a career area of their choice.

Workforce Development Education courses utilizing the cooperative method of instruction must adhere to all:

- federal laws governing the workplace and cooperative education,
- state laws and policies governing the workplace and cooperative education,
- policies adopted by the State Board of Education, and
- locally developed policies.

Local policies should be developed to encourage high expectations of students.

### **What kinds of issues might local policies address?**

- What will be the criteria for school attendance and attendance at the training station?
- How will the school communicate “school” as the priority above work?
- How will the school encourage participation in the related vocational student organization?
- How will the school ensure compliance to rules and regulations of the training station?
- Will the school increase requirements for issuing credit or use state adopted guidelines?
- If students are released early from school to participate in the cooperative method of instruction, where will they go in the afternoons prior to being placed for employment?
- How will grades be computed?
- Will students need insurance coverage?
- What happens if a student terminates employment without the consent of the teacher-coordinator?
- What happens if the student loses a job because of personal fault?
- What if a student loses his/her job through no fault of his/her own?
- Should students be expected to attend employer appreciation events?
- Where will students park?
- Who is responsible for transportation?



# Roles and Responsibilities of Administrators

The role of the administrator is important to ensure quality in programs/courses utilizing the cooperative method of instruction. Your leadership and involvement is critical to the success of any program offering this method of instruction. The following key areas should be monitored to assure compliance to federal and state laws, as well as state and local policies.

## *Responsibilities of the Principal*

- Assure compliance with the policies of the State Board of Education and the Programs of Study.
- Assure high quality programs by monitoring the alignment of students' career development plans with their cooperative education experiences.
- Assure compliance with all state policies and procedures.
- Respond to the needs of students, teacher-coordinators, and businesses involved.
- Provide leadership within the school to maintain quality workforce development programs.
- Work to assure that vocational student organizations are available and utilized.
- Assign appropriate facilities for classroom and office use for teacher-coordinator.
- Provide telephone within teacher-coordinator's office area.
- Provide adequate time for teacher-coordinators to perform coordination activities.
- Maintain a sign-out system for teacher-coordinators.
- Review coordinator's itinerary and monitor coordination activities.
- Review student files for required forms (training agreement, training plans, documentation of conferences, employer contacts, etc.).
- Review required records and documentation maintained by the teacher-coordinator.
- Provide input on strengths and weaknesses to the teacher-coordinator and the workforce development administrator.

## *Responsibilities of the Workforce Development Administrator*

- Assure compliance with the policies of the State Board of Education and the Programs of Study.
- Assure compliance with all state policies and procedures.
- Provide appropriate facilities, equipment, and materials.
- Support principals by informing them of their role in maintaining quality cooperative education.
- Maintain system for required reports.
- Require documentation of student placements and travel for coordination purposes.
- Determine need for and develop of in-service training for local staff.
- Promote and provide support to vocational student organizations.
- Provide leadership in establishing and maintaining advisory committees.
- Publicize successful results of cooperative education.

**It is recommended that principals and workforce development education administrators be familiar with the responsibilities of teachers, students, parents and employers involved in the cooperative method of instruction. You can find a basic list of responsibilities for each in the appendix of this document.**

# Qualifications of the Teacher-Coordinator

The teacher-coordinator is recognized as the key component of an effective and meaningful educational experience utilizing the cooperative method of instruction. The teacher-coordinator is a member of the school staff who serves in dual roles, that of teacher and coordinator. The coordinator must be a qualified and licensed teacher who can work cooperatively with people, motivate others, and can develop training relationships with business and industry.

Classroom instruction and coordination activities must be provided by a teacher licensed in the content area. This individual must also have had pre-service or in-service training in planning, implementing, and evaluating cooperative education programs, therefore meeting the requirements for licensure in North Carolina. Review the *North Carolina Licensure Manual for Public School Professionals* for licensing requirements specific to each program area utilizing the cooperative method of instruction.

In addition to licensure requirements, a teacher-coordinator must be competent in the following:

- ⇒ Guiding and selecting students based upon students' career development plans and local opportunities.
- ⇒ Enlisting the participation of employers.
- ⇒ Teaching related instruction.
- ⇒ Handling educational problems of students.
- ⇒ Directing vocational student organization activities.
- ⇒ Administering the program offering the cooperative method of instruction.
- ⇒ Maintaining good public relations.
- ⇒ Representing the school effectively in contacts made in the community.
- ⇒ Carrying out school policies and policies related to cooperative education.
- ⇒ Representing workforce development education as a part of the total educational program.
- ⇒ Gaining the confidence of the business and school communities.
- ⇒ Assisting students in adjusting to the work environment.
- ⇒ Motivating students and employers.
- ⇒ Understanding local, state, and federal laws relating to workforce development education, the employment of minors, and safety.



**Review the *North Carolina Licensure Manual for Public School Professionals* for minimum standards required by public school law.**

*Chapter 115C of the General Statutes of North Carolina*

*Article 10. Vocational and Technical Education.*

*115C.154. Duties of the State Board of Education.*

- (5) A professionally and occupationally qualified staff is employed and organized in a manner to assure efficient and effective State leadership for vocational and technical education. Provisions shall be made for such functions as planning, administration, supervision, personnel development, curriculum development, vocational student organization and coordination research and evaluation, and such others as the State board may direct.
- (7) Minimum standards shall be prescribed for personnel employed at the State and *local* levels.

# Program Management

The teacher-coordinator must use more than one instructional strategy to maximize benefits of a course. Classroom instruction, on-the-job training, and other workforce development and organizational learning opportunities must be blended to maximize the benefits for individual students. The teacher-coordinator is responsible for planning instruction so students master the competencies identified as appropriate for the course by the State Board of Education.

The teacher-coordinator has to:

- 📖 Plan and manage instruction in the classroom. (This can be large group instruction, small group instruction, or individual instruction.)
- 📁 Coordinate classroom instruction and on-the-job training with the training supervisor at the training station through the use of a training plan.
- ☺ Coordinate learning activities appropriate for the student through the related vocational student organization.

## ***Classroom Instruction***

There is a blueprint and curriculum guide for each Workforce Development Education course supported by the Programs of Study which should be used by teachers planning classroom instruction and developing training plans. The teacher-coordinator reviews the identified competencies and determines appropriate methods of instruction for achieving them. Methods of instruction are tailored to the group and individual needs of students. The cooperative method of instruction requires a close teacher-student relationship. Through conferences with students, parents, and employers, the teacher is able to focus on competencies most critical to the student's immediate success, while building on all the competencies essential for long-term career development.

## ***✍ Grading and Credit***

Students participating in high school apprenticeships, cooperative education or internships (paid/unpaid) will earn academic credit based upon the number of hours spent in the workplace and required projects (similar to senior projects/portfolios). *Local Education Agencies may increase the hourly requirements consistently for all forms of work-based learning.* Additionally, LEAs should create a consistent, system-wide policy on the maximum number of work-based learning credits a student can earn in a given school term. Policy on the minimum number of hours required is provided in the chart below.

Schedule	On-the-job/Work-based Experience Required	Credit Earned for Work-based Component
<b>4 x 4 Block (Semester)</b>	135	1 Carnegie Unit
<b>A-B Day (Year-long)</b>	135	1 Carnegie Unit
<b>Traditional (Year-long)</b>	150	1 Carnegie Unit

LEAs have the flexibility to issue credit in one of two ways:

1. Programs can link the classroom instruction and cooperative education components together for a single grade, worth two credits in a school term.
2. Programs can issue grades for the classroom instruction and the cooperative education components separately.



*If grades are issued separately, students should pass the classroom instruction component in order to receive credit for the cooperative education component.*

- ✓ Students cannot receive credit for the cooperative education component by providing school services such as bus driver, cafeteria worker, office assistant, or teacher assistant. Students with disabilities may be exempt from this policy.
- ✓ On-the-job hours may be counted on the student's wage and hour form during periods of time when school is not in session if the teacher/coordinator is on contract with the school during the time period in question (i.e. holiday breaks).
- ✓ Students earning credit in the fall semester may continue their cooperative education experience and receive credit in the spring semester, provided that:
  - ☑ The teacher-coordinator approves the student as a spring cooperative education placement and is available to provide coordination of work-based learning.
  - ☑ All coordination policies are followed.
  - ☑ A training agreement is on file for the student.
  - ☑ The student is following an appropriate training plan.
- ✓ Students may not receive more than one credit for the same work-based experience in a given school term. For example, a student cannot simultaneously receive academic credit for any two forms of work-based learning.

## ***Coordination and Accountability***

### **Teacher and Student Schedules**



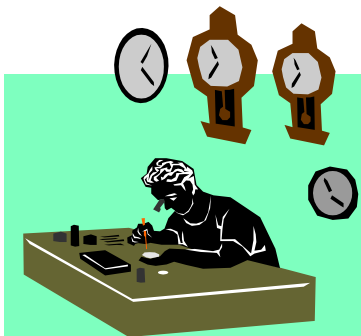
Teacher-coordinators must be given adequate time to coordinate their students' cooperative education experiences. The liability a school accepts by endorsing any form of work-based learning without the required coordination should be a major consideration in making decisions of this nature. Quality cooperative education opportunities cannot exist if proper coordination does not take place. Effective coordination means more than just visiting the student's training station. To ensure quality in the coordination and administration of this methodology, coordination time for teachers must be provided using the following guidelines.

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- ✓ The coordination time should be blocked and scheduled when the businesses are in operation and the employers are available to meet with the teachers.

Students Receiving the Cooperative Method of Instruction	Minimum Time Allocated for Coordination
12 Students	One hour per day plus 25 minutes per week for each additional student over 12.
24 Students	Two hours per day plus 25 minutes per week for each additional student over 24.
36 Students	Three hours per day plus 25 minutes per week for each additional student over 36.

- ✓ As shown in the chart above, twenty-five minutes per week per student must be allocated to the teacher-coordinator to complete coordination activities. These activities include:



- ⌚ Selecting on-the-job training stations.
- ⌚ Conferring with parents, students, and training supervisors.
- ⌚ Visiting training stations to monitor student progress.
- ⌚ Preparing training agreements.
- ⌚ Developing training plans.
- ⌚ Maintaining teacher-coordination records.
- ⌚ Planning and hosting employer orientation workshops.
- ⌚ Developing new training prospects.
- ⌚ Conducting employment and equipment surveys.
- ⌚ Formulating individualized instructional strategies.

- ✓ It is recommended that teacher-coordinators with 36 or more cooperative education students have at least an 11-month contract.

- ✓ The periods in the school day, and the teacher’s contractual period, ultimately determine the number of students a teacher can coordinate. *Unencumbered* time before and after the student’s school day as well as extended day contracts can be utilized to meet coordination requirements.



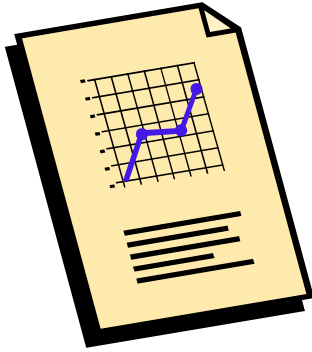
- ✓ Program quality and the safety of students should always be priorities, not the quantity of students receiving the cooperative method of instruction.

- ✓ Work-based learning experiences must be documented on a student’s Career Development Plan to ensure that the student is placed according to his/her career goals.

Failure to comply with coordination requirements and program standards may result in litigation due to negligence should liability issues surface. Policies are created to protect all parties involved.

## Managing Important Documentation

The Department of Public Instruction, Division of Workforce Development Education, documents the successes of students participating in the cooperative method of instruction. Through the Workforce Development Education information system, teacher-coordinators/LEAs are required to submit wage and hour information each year by completing the Wage and Hour Report (VEIS – 6).



Principals and Workforce Development Administrators may require additional documentation to be submitted during a school term to monitor student placements, coordination visits, travel, etc. See the *Helpful Forms* section of this manual for the forms listed below which can be used to make this task manageable.

- ☐ Training Agreement
- ☐ Cooperative Education Placement Report
- ☐ Cooperative Education Coordination Record
- ☐ Cooperative Education Coordinator Sign-out Sheet
- ☐ Cooperative Education Weekly Job Search Update



Administrators may also review training plans, which are required for all students participating in the cooperative method of instruction. Student Training Portfolios, with competency-based connecting activities, can be effectively utilized as training plans. Additionally, administrators may ask coordinators to maintain a coordination notebook or journal. This tool can aid a teacher-coordinator in documenting conversations or meetings with students and employers.

## Selecting Training Stations

Training stations for cooperative education placements require careful selection of cooperating businesses, careful placement of students in jobs that help them reach their career goals, and frequent and timely coordination visits by the teacher-coordinator. Effective cooperative education should enable students to:

- ☑ Apply academic and career knowledge and skills to a job situation.
- ☑ Receive instruction.
- ☑ Gain experience in their chosen career objective.



For the student, the training station becomes a laboratory setting. Each teacher-coordinator is responsible for locating and developing educationally sound training stations. Both the teacher-coordinator and the employer must understand that the job forms an integral part of each student's educational process and the school is not simply acting as a placement service for students desiring part-time work.

The teacher-coordinator should ensure training stations provide an appropriate atmosphere for on-the-job training. She/he should make certain the training station meets the requirements for providing an appropriate placement. To avoid potential conflicts of interest, it is recommended that students not be employed by a family business or be evaluated by a family member at a training station. When the teacher-coordinator is trying to locate potential training stations, she/he should:

- Utilize the Internet to learn about businesses in the community.
- Consult with the program area advisory committee.
- Contact established training stations.
- Contact new businesses in the community.
- Consult the yellow pages of phone directory.
- Consult want ads in the local paper.
- Contact trade associations, professional organizations, civic organizations, and the Chamber of Commerce.
- Consult school administrators and counselors.
- Contact local employment security commission offices.
- Develop a database for appropriate training stations, using the Cooperative Education Contact Record found in the *Helpful Forms* section of this manual and/or other information sources.

### **Criteria for Selecting Training Stations**

The teacher-coordinator should ensure that businesses interested in becoming training stations meet the following criteria:

- ☞ The business must conform to the moral and ethical standards of the school and community.
- ☞ The business should be involved in appropriate activities related to the class offering the cooperative education experience.
- ☞ The business should enjoy a reputation for integrity and progressiveness in the community.
- ☞ The training supervisor should understand the related workforce development education course and the part his/her business plays in the student's education.
- ☞ The business will, under normal circumstances, be able to provide employment for the student during the entire school term.
- ☞ The business will offer the type of work and equipment adequate to provide training for the student's career objective.
- ☞ The training supervisor will work with the teacher-coordinator in planning varied on-the-job learning experiences leading to the student's career objective. For example, a student should rotate through several roles within the business to attain the related course competencies.
- ☞ The business must conform to all local, state, and federal laws and regulations governing the workplace.
- ☞ The business will have a sincere interest in providing educational opportunities for young people and should be able to work effectively with youth.



## Placing Students with Training Stations

A teacher-coordinator makes initial visits to businesses to assess their potential as training stations. The teacher should use a calling card as an introduction. Either on the initial or a subsequent visit, the benefits of the cooperative method of instruction should be presented. The coordinator should stress both employer and student benefits. If the business is willing, the teacher-coordinator can arrange for student interviews. Once a student has been interviewed, a follow-up visit or call must be made to determine how the student did and whether he/she will be a trainee. If employed, the training plan should be developed.



Teacher-coordinators should interview all students to determine individual career objectives before placing them with a training station. Ideally, teacher-coordinators should send several qualified students to be interviewed by employers at each potential training station. Employers will generally be more enthusiastic about the program when they are given the opportunity of selecting from more than one student applicant. When this is not possible, teacher-coordinators should explain this situation to employers.

### ***115C.154.1. Approval of local vocational and technical education plans or applications.***

Local programs using the cooperative workforce development education (vocational and technical educational) method will be approved subject to students enrolled being placed in employment commensurate with the respective program criteria.

## Training Agreements

The training agreement is a written statement of commitment from the training supervisor, school, student trainee, and parents. The training agreement must be signed by each party, with a copy kept by each. A comprehensive cooperative education training agreement is provided in *the Helpful Forms* section of this manual.

## Training Plans



The purpose of the training plan is to support classroom learning with the cooperative method of instruction and to serve as an evaluation tool. Training plans should be prepared jointly by the teacher-coordinator and the employer after reviewing the course blueprint or competency list. Ideally, on-the-job instruction will enhance classroom instruction. The training plan will include learning experiences and competency mastery necessary to meet each student's chosen career objective. The completion of a training plan is the most vital step in placing a student on the job.

Training plans should be designed to meet the needs of individual learners enrolled in the cooperative method of instruction or class. It is suggested that training plans incorporate a rubric describing the expectations of each student participating in the cooperative education component and how the student's grade will be determined. Student Training Portfolios, with connecting activities, can create dynamic training plans, allowing students to see documentation and proof of their competency mastery in a hands-on learning environment.

**Reminder:** All students participating in the cooperative method of instruction must have a signed training agreement on file at the school and the place of employment. Training plans must also be filed documenting each student's on-the-job training experience and progress.

### **Orienting Training Supervisors**



A key responsibility of the teacher-coordinator is to prepare training supervisors for their roles. In many cases, working with students will be a new experience for them. They will be much more effective when they are given special help by the teacher-coordinator on how to train students. A luncheon, breakfast, or other type of meeting is an effective way to explain the roles and responsibilities of training supervisors. Encouraging successful training supervisors from past years to explain the role they have performed in this partnership is one way to prepare new supervisors. Program area advisory committees can assist in developing the agenda for an orientation meeting.

### **Coordination Visits**

Effective coordination is essential for successful on-the-job training. Coordination may be defined as those activities that bring on-the-job training and classroom instruction together in a harmonious relationship for the welfare and progress of the learner and the benefit of the employer. A record should be kept of all discussions during coordination visits and telephone calls.

A regular visitation plan calling for at least one or two visits per grading period should be developed with the employer. More frequent visits may be required to monitor students experiencing problems.

Additional observations of students that do not necessarily require conferring with the employer may be made while visiting the business. A teacher-coordinator, for example, may pose as a customer and buy directly from a student in order to evaluate a student's competence, attitude, and performance level. In addition, the number and frequency of visits may be dictated by such factors as the seasons of the year, type of business, location, and the number of students working in a particular business.



One key purpose of coordination visits is to complete an evaluation on each cooperative education student based upon his/her training plan. The teacher-coordinator should take the training plan and the evaluation instrument to the training supervisor at least once every grading period in order to evaluate the student's performance on the job. The teacher-coordinator should then confer with the student-trainee to discuss his/her evaluation. The evaluation should include a review of the student's training plan, identification of competencies, and an evaluation of work traits.



### **Student Conferences**

Student/teacher conferences are essential for identifying instructional needs, sharing concerns and solving problems. Conferences can be scheduled with students:



- ⌚ In the morning before classes.
- ⌚ During school lunch.
- ⌚ When they are not scheduled to work.
- ⌚ When they are working on projects in class.

Conferences should be held throughout the grading period to discuss student progress and update training plans to provide positive feedback to students and create plans for improvement in areas of need.

### **Advisory Committees**

A program area advisory committee should be consulted to interpret the needs of businesses and to develop programs providing on-the-job training. This committee can provide valuable input for the teacher-coordinator. Typically, the advisory committee assists in:

- Locating new training stations.
- Planning relevant classroom instruction.
- Planning and conducting field trips.
- Reviewing training plans.
- Advising the teacher-coordinator on appropriate employer appreciation events.
- Promoting public relations.



### **Public Relations**

During the school year, each workforce development education class should be prepared to educate the public as to the nature of their educational program. Each vocational student organization should develop a public relations program to be used throughout the school year to assist in the recruitment of new students and training stations.

## ***Vocational Student Organizations***

Vocational student organizations (VSOs) are instructional tools to be used as an integral part of each cooperative education course. When properly planned and conducted, student organization activities can strengthen classroom, laboratory, and training station instruction. They allow students the opportunity to:

- ◆ Build upon academic skills, such as communication skills, computational skills, and critical thinking skills.
- ◆ Follow established procedures for group participation.
- ◆ Develop and enhance team building skills and interpersonal skills among various groups.
- ◆ Develop group processing skills as small groups of students plan, organize and implement activities for the benefit of a chapter and the community.
- ◆ Learn and demonstrate specific skills/competencies essential for their present and/or future jobs.
- ◆ Develop social skills that help students learn to engage appropriately in social interactions.
- ◆ Develop leadership skills.
- ◆ Build character and gain an understanding of the responsibilities of citizenship.
- ◆ Demonstrate competence in occupational knowledge through a wide variety of competency based competitive events.



# Student Recruitment and Enrollment



Two important tasks of the teacher-coordinator are recruiting and enrolling students. As the teacher-coordinator begins the task of recruiting students, she/he must publicize and interpret cooperative education goals and objectives to properly enroll those students whose career goals can be enhanced by the program offering the cooperative method of instruction. Students and parents should be made aware of the advantages of cooperative education in combination with classroom instruction.

The recruitment and enrollment process ideally begins from seven to ten months before students begin instruction and training. Although school systems may operate under different schedules, the following steps should be undertaken during the recruitment and enrollment period.



- ✓ Publicize the cooperative education component available in the related program. Publicity should include purposes, career opportunities, and enrollment procedures.
- ✓ Distribute application forms to homeroom teachers, counselors, and students.
- ✓ Review applications, using a committee of cooperative education coordinator(s) and others. Follow established local admission policies. Priority is given to those students who meet the following criteria:
  - ☑ Completion of prerequisites identified for the course.
  - ☑ Present career objectives in an occupation related to the identified workforce development education program area.
- ✓ Interview students to discuss practices and procedures.
- ✓ Hold follow-up conferences with those entering the cooperative education component or class.
- ✓ Notify those students not accepted. Local school systems must develop non-discriminatory policies for determining admission or rejection.
- ✓ Hold orientation meetings and/or workshops in the spring with students accepted. Encourage parents to attend.



- ✓ Encourage students to affiliate with the appropriate vocational student organization, explaining why such an organization forms an integral part of the total training experience.
- ✓ Make certain that both the student and parent(s) sign the student's training agreement and understand the need to comply with all school and company policies.

# Legal Concerns

The teacher-coordinator of workforce development cooperative education courses should be familiar with applicable federal and state laws. Several important areas in which to focus are child labor laws, workers' compensation, hazardous occupations, apprenticeship, equal opportunity, privacy rights, and employee benefits.

Each year, it is good practice to request the newest information concerning these areas of law. You can get current information via Internet by accessing the **North Carolina Department of Labor** at [www.dol.state.nc.us](http://www.dol.state.nc.us) or calling 1-800-LABOR-NC. Keep a copy of current labor laws in this manual behind the tab marked *Current Labor Laws*.



The best rule of thumb is to always ask the question if you do not know the answer!

The following legislation directly affects cooperative education.

- Fair Labor Standards Act
  - ✓ Hazardous Occupations and Occupational Limitations
  - ✓ Youth Employment Certificates
- North Carolina Wage and Hour Act
- Equal Opportunity Employment Laws

















# *Appendix*



## ***Benefits and Rationale of Cooperative Education***

The basic purpose of the cooperative education experience is to prepare students for meaningful employment in a career area of their choice. It is recognized that cooperative education can make a substantial contribution toward meeting full-time, entry-level employment needs as well as giving all students valuable experience for the eventual transition to work.

### ***Cooperative Education allows STUDENTS to have the opportunity to:***

-  *Learn both in the class and on the job, through significant experiences.*
-  *Develop a greater sense of responsibility and dependability.*
-  *Obtain an understanding of employment opportunities and responsibilities through direct on-the-job experience.*
-  *Acquire attitudes, skills and knowledge necessary for success in their chosen career.*
-  *Develop employability skills which cannot be taught in the classroom setting.*
-  *Develop work habits necessary for individual maturity and job competence.*
-  *Obtain on-the-job training, which can lead to full-time employment for students after graduation from high school or any post-secondary institution.*
-  *Engage in exploratory activities which contribute to the adjustment to the workplace.*
-  *Develop positive attitudes toward work and co-workers and improve interpersonal skills as a result of on-the-job training with experienced workers.*
-  *Develop self-motivation for education and training.*
-  *Learn useful employment skills on real jobs under actual working conditions.*
-  *Increase interest in classroom instruction by the application of academic and job-related learning.*
-  *Develop understanding, appreciation, and respect for work and co-workers.*
-  *Demonstrate the ability to get and maintain a job in order to develop a mature and realistic concept of self.*



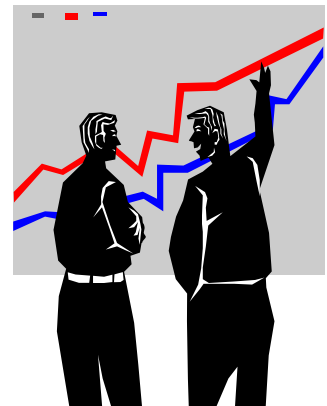


## **SCHOOLS benefit because the cooperative method of instruction:**

- 🔔 Extends educational opportunities beyond the school's physical and financial resources.
- 🔔 Allows students and teachers to build upon the skills and knowledge of outstanding individuals outside the school involved in the training of young people.
- 🔔 Provides a living demonstration of the concept that education is indeed a community-wide responsibility.
- 🔔 Allows utilization of community resources to expand the curriculum and provides more individualized instruction.
- 🔔 Enriches the curriculum by providing on-the-job training experiences needed in the effective preparation of specific career goals.
- 🔔 Provides a means of evaluating the efficiency and success of the curriculum.
- 🔔 Increases the support provided by the school by helping students clarify career goals and providing a practical means of reaching them.
- 🔔 Provides school personnel the opportunity to keep abreast of changes in the workplace, as technology continues to change the way we work and live.
- 🔔 Uses the facilities of cooperating employers in the community as a laboratory for practical training.
- 🔔 Enables a stronger transition system to be developed by combining the efforts of employers and school personnel in job training.
- 🔔 Fosters and maintains a close partnership between school and community.
- 🔔 Furnishes the school with an excellent method of giving students a better understanding of the elements of good human relations in the work environment.

## ***EMPLOYERS have an opportunity to:***

- M Receive the benefits of the school's testing and guidance services.
- M Give student-learners a more thorough understanding of job-related theory and knowledge.
- M Reduce training costs by facilitating student transition from school life to the world of work.
- M Obtain a highly motivated part-time worker who is receptive to instruction.
- M Participate in a community endeavor to prepare young people for occupational life and adult citizenship.
- M Receive assistance in selecting qualified personnel.
- M Benefit from better communication between educator and employers.
- M Improve the public image of the business.
- M Participate in planning the training for the student/trainee.
- M Provide the private sector with a means to take an active part in a community service.



***The COMMUNITY benefits because cooperative education:***

- ☺ Develops a continuing pattern of school-community relationships.
- ☺ Improves the community's pattern of job stability by giving local students job skills and civic competence.
- ☺ Introduces local employment opportunities to students.
- ☺ Helps reduce the number of unemployed students at the conclusion of their instructional program.
- ☺ Encourages students to stay in the community when they have already found their places in community life.
- ☺ Provides constant labor resources.
- ☺ Provides a means for developing better community-school relations.



## ***Roles and Responsibilities***

A number of people are involved in the operation of successful cooperative education. The roles and responsibilities of the teacher-coordinator, student, parents and employer/training supervisor are outlined on the following pages.

### **Responsibilities of the Teacher-Coordinator**

#### **Guidance**

- ☞ Work with guidance counselors to facilitate the proper placement of students in the related course.
- ☞ Interview prospective students for entry into the program.
- ☞ Assist students in making other course selections related to career goals.
- ☞ Assist in determining appropriate placements.
- ☞ Facilitate the learning of successful job seeking skills.
- ☞ Maintain good communication with students concerning progress in class and on the job.

#### **Classroom Instruction**

- 📖 Organize classroom/lab for instructional activities.
- 📖 Explain course goals and purposes to students.
- 📖 Use program area competencies and curriculum materials as a basis for planning instruction.
- 📖 Apply instructional strategies to meet individual training needs.
- 📖 Continually evaluate classroom instruction and on-the-job training for their related learning experience.
- 📖 Select and/or develop appropriate materials for related instruction.
- 📖 Provide the opportunity for students to participate in the appropriate vocational student organization.
- 📖 Encourage and facilitate the use of technology in educational experiences of students.

#### **Coordination**

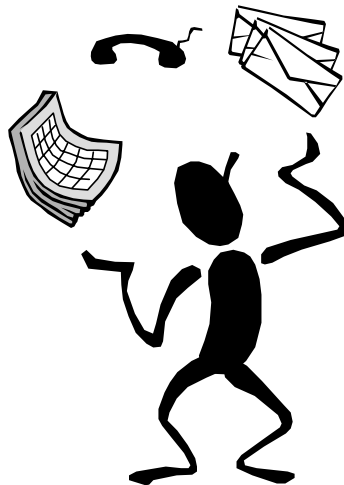
- 📁 Visit businesses to select appropriate training stations.
- 📁 Orient new training supervisors.
- 📁 Develop training plans.
- 📁 Visit training stations to observe students.
- 📁 Visit training stations to confer with training supervisors concerning student performance and progress.
- 📁 Hold conferences with students, employers, and parents.
- 📁 Resolve any problems that arise between the student and the training supervisor.
- 📁 Arrange for needed adjustment of any misplaced students.
- 📁 Ensure that the training supervisor provides consistent, effective guidance and supervision in accordance with the student's training plan.

## Operation and Administration

- . Ensure that students electing job placement are employed in a job directly related to course competencies and tentative career objective.
- . Provide parent orientation.
- . Review and complete training agreement and training plan with each student, training supervisor, and parent.
- . Assure that all legal requirements have been met.
- . Document coordination visits and conferences with training supervisors and students.
- . Maintain accurate and current coordination records.
- . Maintain accurate and current student files with required signatures.
- . Use appropriate evaluation instruments to measure student achievement of competencies on the job.
- . Continually evaluate the job market to secure additional training stations.
- . File itinerary with school administration.
- . Submit a list of cooperative education students' names, career objectives, places of employment, and job titles to your principal and workforce development education administrator(s) as requested.

## Public Relations

- ☺ Visit employers to encourage their cooperation in establishing/maintaining the cooperative education component.
- ☺ Participate in community and civic activities.
- ☺ Promote workforce development education through vocational student organization activities and community projects.
- ☺ Plan an employer/employee function with students during the school year to honor employers who have provided training stations for training students.
- ☺ Participate in community surveys to determine appropriate types of training stations.
- ☺ Develop brochure on vocational program(s) to distribute to the business community.
- ☺ Promote within the school using technology, brochures, displays, and articles in the school newspaper.



## Responsibilities of the Student

- ✍ Maintain a good attendance record, not only at school but also on the job.
- ✍ Complete and sign appropriate forms.
- ✍ Complete all requirements of the training plan.
- ✍ Participate in the vocational student organization.
- ✍ Maintain up-to-date wage and hour reports.
- ✍ Cooperate with teacher-coordinator in securing an appropriate on-the-job placement.
- ✍ Conform to the rules and regulations of training station.
- ✍ Notify the teacher-coordinator and employer if unable to work, according to school guidelines and the policies of the training station.
- ✍ Dress appropriately; conduct self in a businesslike manner; be prompt, courteous, and groomed according to the training supervisor's requirements.
- ✍ Have transportation to and from the training station.
- ✍ Participate in employer recognition activities.



## Responsibilities of the Parent(s)



- Π Provide guidance in career selection.
- Π Approve the student's involvement in the cooperative education component.
- Π Support the policies of the program.
- Π Sign appropriate forms for student to enroll in cooperative on-the-job training.
- Π Provide support and encouragement for student success in school and on the job.
- Π Work cooperatively with teacher-coordinator and student in solving school, work, and home problems.

## Responsibilities of the Training Supervisor/Employer

- Be aware of the objectives of the vocational program.
- Interview and select student(s) for employment without regard to sex, race, color, national origin, creed, or handicapping condition.
- Provide early and thorough orientation of the student to job duties and responsibilities.
- Work with the teacher-coordinator and student in developing a training plan.
- Provide feedback to the teacher-coordinator on job performance through telephone calls and/or on-site visits of the teacher-coordinator.
- Provide adequate supervision on the job.
- Complete a written evaluation jointly with the teacher-coordinator each grading period.



## Glossary of Terms

*Connecting Activities:* Activities assigned to the learner to reinforce competencies attained both in the classroom and on the job.

*Cooperative Education:* Cooperative education is a method of instruction where workforce development education instruction is combined with paid employment directly related to classroom instruction. The two experiences must be planned and supervised by both the school and the employer so that each contributes to the education and employability of the student. Written cooperative arrangements, showing the instruction to be provided, are jointly developed by the school and the employer/training supervisor. Credit is earned for both the classroom and the on-the-job training components.

*Employer:* Public and private employers who provide approved on-the-job training opportunities for students.

*Extended Contract:* A period of employment beyond the regular school term or regular school day during which the teacher-coordinator devotes time to instruction, workplace visits and/or development of curriculum.

*Integrated and Applied Curriculum:* The integration of academic and technical curricula designed to bring together related concepts, generalizations, critical thinking skills and processes, combined with techniques providing students the opportunity to apply their knowledge and skills through authentic tasks/assessments.

*Post-Secondary Education Institutions:* Institutions of higher learning which allow students to continue their education in specific areas of study.

*SCANS:* Secretary's Commission on Achieving Necessary Skills (Commission of the U.S. Department of Labor)

*Teacher-Cordinator:* A licensed member of the school staff responsible for the delivery of classroom instruction and administration of the cooperative education component in an approved program area. This individual acts as the liaison between the school and training stations involved in the cooperative method of instruction for students.

*Training Agreement:* A written contract between the student learner, the parents of the student, the school, and the training station, stipulating the conditions of employment and participation in the cooperative education method of instruction.

*Training Plan:* A plan, which includes a rubric, designed to establish learning outcomes and measures for a student participating in the cooperative education component. Curriculum-based connecting activities can be developed to serve as the student's training plan, creating a portfolio documenting the achievement/mastery of expected outcomes.

*Training Supervisor:* The individual working with an authorized training station assisting cooperative education students with on-the-job training.

*Training Station:* A community business that cooperates with the school to provide students with quality, on-the-job training.

*Vocational Student Organization (VSO):* Vocational student organizations are for individuals enrolled in vocational education programs. These organizations engage in activities as an integral part of the instructional program and utilize the business community to provide authentic assessment through competency-based competitive events. Such organizations must have state and national units aggregating the work and purposes of instruction in Workforce Development Education at the local level.

*Workforce Development Education:* A public education program that provides educational experiences that enhance the vocational development processes of exploring and establishing oneself in worker, family member and citizen roles. Its unique contribution is the development of occupational competency.

*Work-Based Learning:* An exposure or training activity which takes place in a business or industrial environment to allow students to gain a greater knowledge of areas related to their career interests.

## Resources

Child Labor Requirements in Nonagricultural Occupations Under the Fair Labor Standards Act, U.S. Department of Labor, Employment Standards Administration, Wage and Hour Division. Washington, D.C., 1990.

*Cooperative Education in High School: Promise and Neglect*, by Paul E. Barton. Educational Testing Service, Policy Information Center, 1998.

Cooperative Education Work Experience Handbook, North Carolina Community College System, Program Services, Raleigh, N.C., 1998.

*The Employer Connection: State Strategies for Building School-to-Work Partnerships*, National Governors' Association, Washington, D.C., 1996.

Labor Laws, North Carolina Department of Labor, Raleigh, N.C. 1994.

*Learning to Work: Making the Transition From School to Work*, U. S. Congress, Office of Technology Assessment, Washington, D.C., 1996.

Programs of Study and Support Services Guide. Workforce Development Education, Division of Instructional Services, North Carolina Department of Public Instruction. Raleigh, NC, 1997.

Public School Laws of North Carolina, State Board of Education, General Statutes of North Carolina, Raleigh, NC, 1998.

The Official Guide to the Perkins Act of 1998, American Vocational Association, Alexandria, VA, 1998.

Ralph Mason and Peter Haines, *Cooperative Occupational Education and Work*, 1999.

*Research in School-to-Work Transition Programs in the United States*, National Center for Research in Vocational Education, Berkeley, CA, 1994.

School-to-Work Practical Guide for Developing Work-Based Learning, Division of Secondary Vocational Education, Kentucky Department of Education, Frankfort, KY, 1995.

Work-based Learning Component Handbook Series, Cabarrus County Schools, NC, 1995.

# COOPERATIVE EDUCATION MANAGEMENT GUIDE FOR TEACHER-COORDINATORS

“A Realistic Approach”

I'VE READ ALL  
THIS STUFF . . .  
NOW WHAT DO I  
DO?







# FUN WITH FORMS

**TIP: Copy forms in different colors for easy identification.**

## Cooperative Education Training Agreement

**What is it?** An agreement that outlines the rules and responsibilities of the student, parents, employer, teacher-coordinator, and school administration.

### *How do I use it?*

- ◆ Obtain signatures of all parties involved in cooperative education
- ◆ Obtain all signatures before end of schedule change period
- ◆ Require student to obtain signature of parent and employer to ensure that all parties are aware of their involvement in the program
- ◆ Give student and employer a copy for reference
- ◆ Keep the signed copy on file for teacher

**TIP: Have school official sign the Training Agreement before you make copies.**

## Cooperative Education Training Plan

**What is it?** A list of competencies a cooperative education student is expected to demonstrate while in the workplace.

### *How do I use it?*

- ◆ Obtain samples from local LEA for your subject area
- ◆ Develop a plan for each student
- ◆ Discuss with employer, make necessary adjustments, and obtain signature
- ◆ Discuss with student and obtain signature
- ◆ At end of grading period, have employer review plan, evaluate student, and update plan for next grading period



**NOTE: Connecting activities may be used to create a training plan**

## **Student Wage and Hour Record**

**What is it?** Documentation of hours worked and wages earned on a monthly basis.

### ***How do I use it?***

- ◆ Require students to complete form on a monthly basis
- ◆ Maintain a running total of wages and hours throughout the year
- ◆ Use figures to complete the required VEIS-6 form provided by your LEA at the end of the school year
- ◆ File completed Wage and Hour Records in a secure place

**TIP 1:** Set a due date for the wage and hour form. Suggested date is no later than the 5<sup>th</sup> of each month.

**TIP 2:** Give a grade for completing the wage and hour form.

**TIP 3:** Verify continued student employment by employer signature on Wage and Hour Record, or by periodically checking students' pay stubs.

**TIP 4:** Simplify your job by maintaining wage and hour totals on Microsoft Excel or Works spreadsheet program.

## **Summer Wage and Hour Record**

**What is it?** A record of wages earned and hours worked during the previous summer.

### ***How do I use it?***

- ◆ Require students to complete form at the beginning of the school year
- ◆ Use figures to complete the required VEIS-6 form provided by your LEA at the end of the school year
- ◆ File completed summer wage and hour reports in a secure place

## **Cumulative Wage and Hour Record**

**What is it?** A form, used by cooperative education students, to record their wages and hours worked at their training site for the year on a monthly basis.

### ***How do I use it?***

- ◆ Require students to update form each month, prior to turning in wage and hour report, so as to monitor progress on completing the required hours
- ◆ Use as a check for accuracy against your cumulative Wage and Hour Records

## **Weekly Job Search Update/Interview Summary**

**What is it?** Forms used by students to document job search activities while unemployed.

### ***How do I use it?***

- ◆ Monitor student progress in securing employment
- ◆ Documentation for removal from the program, if necessary
- ◆ File all job search forms in a secure place

## **Cooperative Education Contact Record**

**What is it?** A record of individual student training station information and all contacts made with the training station regarding that student.

### ***How do I use it?***

- ◆ Keep in coordinator's notebook as a reference prior to making coordination visits
- ◆ Document use of coordination time

**TIP: Keep notes on individual employers or training stations that may be helpful in the future.**

## **Employer Evaluation**

**What is it?** An evaluation of a student's job performance as well as general work habits and personal traits which is completed by the employer.

### ***How do I use it?***

- ◆ Meet with each employer during each grading period and have them complete the evaluation
- ◆ Review with student and discuss ways of improving job performance
- ◆ Incorporate into student grade for the grading period
- ◆ File completed evaluations in a secure place

**TIP 1: Schedule appointments so that all evaluations will be completed and returned before the end of the grading period.**

**TIP 2: Take stamped, self-addressed envelopes to your appointments in case the employer prefers to complete evaluation at a later time.**

## **Request for Job Change**

**What is it?** A form completed by a student when he/she is considering a job change.

### ***How do I use it?***

- ◆ Make sure students are aware that the form must be completed prior to giving notice at current job
- ◆ Use in discussion with student and/or parent about potential job change

## **Cooperative Education Placement Report**

**What is it?** A form that may be required by your LEA to document student placement.

### ***How do I use it?***

- ◆ Use contact record to help in completing the report
- ◆ Complete when requested by LEA (usually in mid-October)

## **Cooperative Education Coordination Record**

**What is it?** A form that may be required by your school or LEA to document coordination activities.

***How do I use it?***

- ◆ Update on a daily basis as necessary
- ◆ Submit on a monthly basis
- ◆ Should correspond to Contact Record

**Coordinator Sign-out Sheet**

***What is it?*** Notification and documentation of coordination-related absence from the school site.

***How do I use it?***

- ◆ Use if school does not currently have a sign-out process
- ◆ Fill out each time you leave the school site for coordination-related reasons

**Mileage Report**

***What is it?*** Request for reimbursement of mileage accumulated in the performance of coordination and VSO activities.

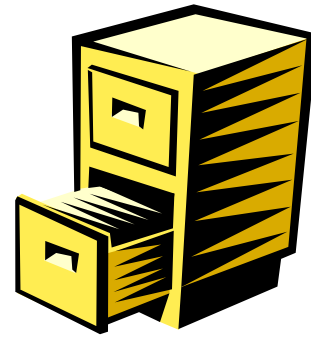
***How do I use it?***

- ◆ Obtain local LEA mileage form
- ◆ Obtain required signatures prior to submitting
- ◆ Submit in a timely manner based on LEA deadlines

**TIP 1: Use trip odometer to track mileage.**  
**TIP 2: Have form handy in car to record mileage daily.**







# COORDINATOR FILE MANAGEMENT







## Individual Student Administrative Files

### *What do I do and why?*

-  Set up one file per student
-  Put all co-op files together
-  Maintain secure place for forms, confidential records and other documentation
-  Meet state requirement of keeping files for five years




**TIP: Use the filing system that works best for you. The most important thing is to be organized!**

### *What should go in the files?*

-  Monthly wage & hour forms
-  Past evaluations
-  Training agreement
-  Information or documents from training station









## Coordinator's Notebook

### *What do I do and why?*

-  Use dividers to create one section per student
-  Place completed student contact record in each student's section
-  All training station and student information will be at your fingertips

**TIP 1: Never go on a coordination visit without your coordinator's notebook.**  
**TIP 2: Record mileage and information about the visit before leaving the parking lot, so you don't have to try to remember everything later.**

### *What should go in the notebook?*

-  Contact record
-  Training agreement (optional)
-  Coordination record (if required)
-  Copy of mileage form (optional)
-  Grading period 1 Connecting Activity #1 - Orientation to the Workplace (optional)
-  Blank evaluation sheets
-  Self-addressed envelopes and a few stamps
-  Extra business cards











**NOTE: Many coordinators will use both notebook and files. You can have information you need at a glance with the notebook while maintaining a secure place for confidential documents in files.**

# STUDENT FILE MANAGEMENT






## *What should I require?*

-  Each student should maintain a notebook or folder designated for cooperative education materials.
-  The following documents should be kept in the notebook or folder:
  -  Wage and Hour Record for the current month
  -  Cumulative Wage and Hour Record
  -  Training agreement (copy)
  -  Training plan (copy)
  -  Sample employer evaluation
  -  Request for job change form

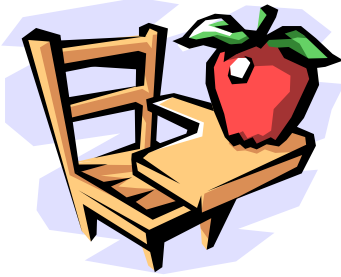
**TIP: Keep a sufficient number of Wage and Hour Records readily available for student use.**

## *Why?*

-  Reinforces that cooperative education is a method of instruction and not just a part-time job
-  Allows student to track progress in his/her work-based learning experience
-  Serves as reference point for student regarding program requirements



**NOTE: If using connecting activities, students should keep required forms in portfolio or connecting activity notebook.**



# STUDENT ORIENTATION

**WHY?** To ensure that all students enrolled in cooperative education understand the responsibilities and expectations of the program.

**WHEN?** As soon as possible after school begins, but prior to the end of the schedule change period.

Announce place and time of orientation meeting beginning on the first day of class.

**TIP:** If your coordination period is the last period of the day, this is an ideal time for orienting students, as most will also have that period free.  
**TIP 2:** Schedule two different orientation times; require attendance at one.

## WHAT DO I COVER?

### Administrative

- ✓ Check attendance
- ✓ Have students list place of employment and job title

### Purpose and Expectations of Cooperative Education Program

- ✓ Stress that job performance and behavior are both a reflection of the student as an individual, as well as the coordinator, program, school, and district
- ✓ Stress that this is not just a part-time job, but a learning situation for which students are held accountable
- ✓ Discuss what jobs are appropriate for your program area
- ✓ Inform students of appropriate times to discuss work-based issues with you, their coordinator
- ✓ Review school policy for cooperative education students remaining on campus during their release period

### Training Agreement

- ✓ Cover all items under Student Responsibilities section
- ✓ Stress the number of hours required and the training plan to be completed to receive academic credit
- ✓ Stress consequences of dishonesty, being fired, quitting, class failure
- ✓ Stress importance of remaining with the original job placement and review Request for Job Change Form
- ✓ Explain signatures required and provide deadline for returning signed training agreement

**TIP:** Give student your business card to leave with employer when obtaining signature on Training Agreement.

### Evaluation

- ✓ Explain grading system (what will be graded and by whom)
- ✓ Explain employer visits by coordinator
- ✓ Explain evaluation forms

**TIP: Include attendance at orientation session in your grading system.**

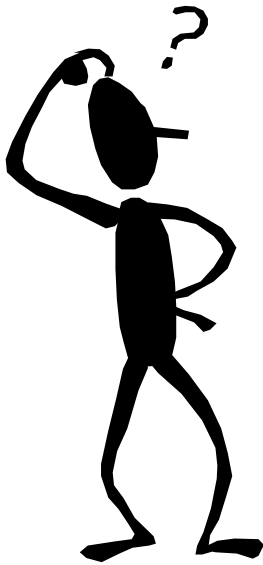
### Wage and Hour Record

- ✓ Have students complete summer Wage and Hour Record
- ✓ Explain how to complete monthly Wage and Hour Record
- ✓ Explain due dates

### Address Unemployed Students and Students with Inappropriate Placements

- ✓ Release students in appropriate placements
- ✓ Explain deadline for securing an appropriate position and consequences for not meeting deadline
- ✓ Explain job search process and required documentation (Weekly Job Search Update and Interview Summary)

## FREQUENTLY ASKED QUESTIONS



### **After I work the required number of hours, can I quit working?**

No. Remember, this is an educational experience designed to provide you with skills and competencies, not just work experience. The required number of hours is a minimum and serves as a guideline, not a limit. To receive credit, you must work continuously throughout the term and must record *all* hours worked on the Wage and Hour Record. This information is needed by the coordinator for their reports.

### **What happens on days with schedule changes due to testing, assemblies, or bad weather?**

School and classes are always your first priority. You must attend your classes. Be sure to contact your employer as soon as you are aware of impending schedule changes and make necessary arrangements. You must report to work on holidays and school days canceled because of bad weather, according to the requirements of your employer.

### **I want to change jobs. What do I need to do?**

Before you make any job changes, you must complete the Request for Job Change Form and talk to your coordinator. To avoid having your grade penalized, you must have your coordinator's permission before changing jobs. The cooperative education program is a learning experience, not just a part-time job. Changing jobs will limit the effectiveness of the experience.

# EMPLOYER CONTACT

## WHEN?

At the beginning of the school year

- ◆ Introduce yourself, establish rapport
- ◆ Review program expectations
- ◆ Discuss student progress to date
- ◆ Give a copy of school calendar
- ◆ Discuss ways for employer to be involved in your program (guest speaker, VSO judge, sponsor, etc.)
- ◆ Leave business card and copy of Training Agreement and Employer Evaluation

**TIP: Make folder containing copy of documents and your business card to leave with employers.**

A minimum of once per grading period

- ◆ Discuss student progress to date
- ◆ Obtain employer evaluation of student performance

## HOW?

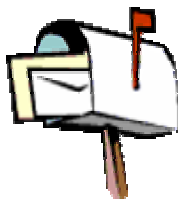


### **Personal Visits**

- ◆ Visit at least once per quarter
- ◆ Always attempt to set appointment, stating reason for visit
- ◆ Keep length of visit to a minimum – employers are busy people!

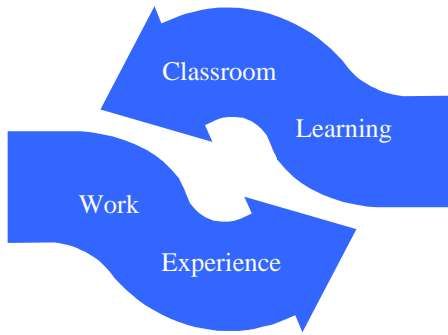
### **Phone Contact**

- ◆ Use to set appointments
- ◆ Use for follow-up contact
- ◆ Use when personal visit is inconvenient for employer



### **Mail Contact**

- ◆ Use to secure evaluation if employer cannot complete during visit
- ◆ Use to send greeting cards for public relations reasons



# CONNECTING ACTIVITIES

Connecting activities are an alternative to the traditional training plan. These activities will challenge the student to apply basic concepts learned in class to their specific training station. A sample of connecting activities for first and second year marketing cooperative education students is included in this manual.

## **COMPONENTS OF CONNECTING ACTIVITIES**

- ☑ Activities based directly on course competencies applicable to workplace
- ☑ Two activities per grading period (can be adjusted according to school calendar)
- ☑ Answer sheets for each activity
- ☑ Evaluation sheets for each activity

## **BENEFITS**

- ☑ Direct application of course competencies
- ☑ Demonstrates relevance of curriculum to the workplace
- ☑ Promotes a closer working relationship between student and employer
- ☑ Promotes cooperative education program as a learning experience
- ☑ Provides strong basis for objective evaluation of student application of course competencies on the job
- ☑ Minimizes negative effect of supervisor turnover on coordination process
- ☑ Requires students to apply classroom learning to a realistic situation
- ☑ Requires students to explore different aspects of the training station
- ☑ Makes student aware of course requirements and evaluation criteria from the beginning
- ☑ Presents a format that is easy for both coordinators and students to follow and use

## **TIPS FOR EFFECTIVE USE OF CONNECTING ACTIVITIES**

- ☑ Furnish students with the complete set of connecting activities in a 1” binder at the orientation meeting
- ☑ Put a label with student name on outside of notebook for easy identification
- ☑ Develop a calendar of due dates for the year
- ☑ Require students to turn in the entire notebook when connecting activities are due
- ☑ Offer help sessions to review and/or explain competencies that will be applied in the upcoming connecting activity
- ☑ Copy evaluation sheets in a different color for easy identification and as a divider between activities

**FORMS! FORMS!**



**MORE FUN WITH FORMS!**

# Helpful Forms

The pages in this section were intentionally not numbered in order to allow administrators and teacher-coordinators to easily pull the forms and use them. These forms were designed to be helpful in managing the cooperative method of instruction. Your school or LEA may use other or similar forms for management and evaluation of this method of instruction. We hope these tools will be useful to you.

## List of Helpful Forms

- 📄 Cooperative Education Training Agreement
- 📄 Cooperative Education Wage and Hour Record
- 📄 Summer Wage and Hour Report
- 📄 Cooperative Education Cumulative Wage and Hour Record
- 📄 Cooperative Education Employer Evaluation
- 📄 Cooperative Education Contact Record
- 📄 Cooperative Education Placement Report
- 📄 Cooperative Education Coordination Record
- 📄 Cooperative Education Coordinator Sign-out Sheet
- 📄 Cooperative Education Weekly Job Search Update
- 📄 Cooperative Education Interview Summary
- 📄 Cooperative Education Request for Job Change
- 📄 Cooperative Education Student Performance Appraisal Instrument  
*“SCANS Competencies and Foundation Skills”*

**You can personalize forms by inserting your school’s name! Use your electronic version of these forms to personalize your management system.**

# Cooperative Education Training Agreement

Student: \_\_\_\_\_

School: \_\_\_\_\_

Job Title: \_\_\_\_\_

Training Site: \_\_\_\_\_

*Participation in the cooperative education method of instruction requires all parties concerned to agree to the following responsibilities.*

## **Employer Responsibilities**

The employer, recognizing that a training plan is being followed and that close supervision of the student will be needed, agrees:

- To assist in training plan development on a grading-period basis.
- To place the student in a training position for the purpose of providing educational and employment experiences and tasks of instructional value.
- To ensure the student's employment activity will be supervised by an experienced and qualified person, with tasks to be performed under safe and hazard free conditions.
- To ensure the student will receive the same consideration given other employees with regard to safety, health, social security, general employment conditions and other regulations of the firm.
- To notify the teacher if difficulties arise, changes are necessary, a lay-off, or termination of employment seems likely to occur.
- To keep the teacher informed of the student's progress and to assist in the evaluation of the student.
- To avoid discrimination against the student on the basis of race, color, national origin, sex, religion, creed, disadvantaging or handicapping condition, or limited English proficiency, hiring, placement, assignment of work tasks, hours of employment, levels of responsibility, pay, and other employment procedures.
- To adhere to all federal and state laws governing employment, child labor, minimum wages, and other applicable regulations.

## **Teacher-Coordinator Responsibilities**

The teacher-coordinator, representing the school, will coordinate the training program toward satisfactory preparation for the student's career interests, and agrees:

- To provide the necessary related classroom instruction and develop a training plan or connecting activities for each grading period or school term.
- To make at least one visit per grading period to the training station to observe the student, consult with employer, and supply assistance with student training problems to assure a successful work experience.
- To assist in the evaluation of the student.
- To attempt to resolve complaints with all parties concerned, with the authority to withdraw a student when necessary.
- To accept students into the program, and inform students of job opportunities without regard to race, color, national origin, sex, religion, creed, disadvantaging or handicapping condition, or limited English proficiency.

## **Parent/Guardian Responsibilities**

The parent or guardian, realizing the importance of the training program in helping the student to achieve career objectives, agrees:

- To encourage the student to effectively carry out his/her duties and responsibilities as outlined in this agreement.
- To assume responsibility for the conduct, transportation, and necessary insurance of the student while in the training program, including the time in class, on the job, at vocational student organization (VSO) functions, and en route to school, the job, VSO functions, and home.
- To work cooperatively with the teacher and the student in solving problems relating to school and work.

## **Student Responsibilities**

The student promises to abide by all implied and stated terms included in this training agreement, namely:

- Students must work a minimum of 135 hours or 150 hours in a school term, based upon the schedule their school follows, to receive an academic credit for the cooperative work experience. Local school systems may increase this requirement as long as it is consistent with all forms of work-based learning receiving academic credit. It is recommended that the student work between 15 and 20 hours per week, dependent on school performance.
- The student is expected to remain with the original job placement throughout the school term, and will not be granted permission to change without proper justification. He/she will not terminate employment with the training station without prior written consent of the teacher-coordinator.
- The student is expected to conform to employer rules and regulations. Professional dress, conduct, grooming, attendance, punctuality, and adherence to the work schedule are expected.
- The student is not allowed to work on days absent from school without prior approval of the teacher.
- The student must notify the employer and school each day he/she is unable to work, according to company policy.
- School will be the first priority! If a student is told by a teacher or administrator to remain after school, he/she must do so.
- The student is responsible for providing his/her own transportation to and from the training station.
- The student is expected to maintain accurate and up-to-date wage and hour records and complete connecting activities by established deadlines. Failure to submit records and assignments to the teacher as requested will result in failure and removal from the cooperative education component.
- The student is expected to join the student organization relative to the program area, pay dues, and participate in VSO activities.
- The student who loses his/her job because of dishonesty may be dismissed from the cooperative education component and lose all credit for the school term. Such an offense is serious and will become part of the permanent work record.
- The student who loses his/her job because of inefficiency, lack of interest, poor behavior, neglect of school or employer regulations, etc. will be disciplined on an individual basis, may receive no credit for the program, and/or may be dismissed from the cooperative education component.
- Credit may be received by linking the classroom and on-the-job components as a single grade worth two credits in a school term or by issuing the two grades separately. If grades are issued separately, students should pass the classroom instruction component in order to receive credit for the cooperative education component.

---

**Signature of Student**

**Date**

---

**Signature of Parent/Guardian**

**Date**

---

**Signature of Teacher-Coordinator**

**Date**

---

**Signature of Principal**

**Date**

---

**Signature of Employer**

**Date**

# COOPERATIVE EDUCATION WAGE AND HOUR RECORD

Name \_\_\_\_\_

Month \_\_\_\_\_

Training Station \_\_\_\_\_

4	5
4 – 10 6 hours	

Place the date in the upper right box.  
 Place a check in the upper left box to indicate attendance at school that day.  
 Record the hours you were scheduled and number of hours you worked in the main box (see example on the left).  
 Record the monthly totals on your Cumulative Wage and Hour Record.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Hours	Wages

**TOTAL HOURS** \_\_\_\_\_

**BONUS/TIPS** \$ \_\_\_\_\_

**TOTAL WAGES** \$ \_\_\_\_\_

**Calculate:** \_\_\_\_\_ x \_\_\_\_\_ x \$ \_\_\_\_\_ = \$ \_\_\_\_\_  
                     **Weeks**   **Hours**                      **Hourly Pay**                      **Total Earned**

## SUMMER WAGE & HOUR REPORT

Please complete this form as accurately as you can. This information may be documented on our statewide Wage and Hour Report.

NAME \_\_\_\_\_

COURSE \_\_\_\_\_

TEACHER \_\_\_\_\_

I worked approximately \_\_\_\_\_ weeks this summer.

I worked an average of \_\_\_\_\_ hours per week.

My hourly pay was \$\_\_\_\_\_.

Calculate: _____ x _____ x \$ _____ = \$ _____ Weeks      Hours      Hourly Pay      Total Earned
--

**COOPERATIVE EDUCATION**  
**CUMULATIVE WAGE AND HOUR RECORD**

Student \_\_\_\_\_

School Year \_\_\_\_\_

INSTRUCTIONS: This record should be updated monthly using the totals from your wage and hour sheet.

	<u>HOURS</u>	<u>WAGES</u>
<u>SUMMER EMPLOYMENT</u>		
JUNE	_____	\$ _____
JULY	_____	\$ _____
AUGUST	_____	\$ _____
 <u>SCHOOL YEAR EMPLOYMENT</u>		
AUGUST	_____	\$ _____
SEPTEMBER	_____	\$ _____
OCTOBER	_____	\$ _____
NOVEMBER	_____	\$ _____
DECEMBER	_____	\$ _____
JANUARY	_____	\$ _____
FEBRUARY	_____	\$ _____
MARCH	_____	\$ _____
APRIL	_____	\$ _____
MAY	_____	\$ _____
<u>TOTALS FOR SCHOOL YEAR</u>	_____	\$ _____

**HIGH SCHOOL**

**COOPERATIVE EDUCATION**

**EMPLOYER EVALUATION**

**Grading Period** \_\_\_\_\_

Student \_\_\_\_\_

Teacher-Cordinator \_\_\_\_\_

Supervisor \_\_\_\_\_

Training Station \_\_\_\_\_

Completing the evaluation will assist the Teacher-Cordinator in helping this student learner to be an effective employee. The work experience provided is part of the school's instructional program and your rating is used in determining final grades for the student learner.

Evaluation Scale		
Superior (96-100)	Above Standard (85-89)	Below Standard (70-76)
Well Above Standard (90-95)	At Standard (77-84)	Unsatisfactory (Below 70)

Please complete this evaluation based on how well the student learner meets company expectations with regard to:

SCORE

SCORE

\_\_\_\_\_ Suitability of dress

\_\_\_\_\_ Taking criticism

\_\_\_\_\_ Personal hygiene

\_\_\_\_\_ Getting along with others

\_\_\_\_\_ Positive attitude

\_\_\_\_\_ Using good judgment

\_\_\_\_\_ Interest in work

\_\_\_\_\_ Reporting to work on time

\_\_\_\_\_ Cooperation

\_\_\_\_\_ Attendance

\_\_\_\_\_ Initiative

\_\_\_\_\_ Time management

\_\_\_\_\_ Adaptability/Flexibility

\_\_\_\_\_ Producing quality work

\_\_\_\_\_ Dependability

\_\_\_\_\_ Accepting responsibility

\_\_\_\_\_ Honesty/Integrity

\_\_\_\_\_ Effective communication skills

\_\_\_\_\_ Following directions

\_\_\_\_\_ Effective customer service

Overall rating of student learner (letter grade) \_\_\_\_\_

COMMENTS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Supervisor's Signature \_\_\_\_\_

Date \_\_\_\_\_

# COOPERATIVE EDUCATION CONTACT RECORD

Student Employed: \_\_\_\_\_

Training Station: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Street

City

Zip

Telephone Number: \_\_\_\_\_

Immediate Supervisor(s): Mr. / Ms. \_\_\_\_\_

First Name

Last Name

Mr. / Ms. \_\_\_\_\_

First Name

Last Name

Best Time for Visits: \_\_\_\_\_

Directions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## COORDINATION COMMENTS / CONTACTS

Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

**COOPERATIVE EDUCATION CONTACT RECORD (cont.)**

Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_ Person Contacted: \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_











## COOPERATIVE EDUCATION WEEKLY JOB SEARCH UPDATE

Students are to complete the following form weekly while unemployed. Students should visit a minimum of \_\_\_\_\_ businesses per day/week. For any business you visit, provide the date of the visit, the name and phone number of the business, the person you contacted, and state whether or not you filed an application. All follow-up activities should be noted.

Name \_\_\_\_\_

Week of \_\_\_\_\_

Date	Business	Phone #	Contact Person	Application Filed	Follow-up

Comments \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Student Signature \_\_\_\_\_

Date \_\_\_\_\_



**COOPERATIVE EDUCATION INTERVIEW SUMMARY**

*Complete the following form for each interview in which you have participated while unemployed.*

Name of Business \_\_\_\_\_

Location \_\_\_\_\_

Position Applied For \_\_\_\_\_

Date of Interview \_\_\_\_\_

Interviewed by \_\_\_\_\_

Title \_\_\_\_\_

1. What questions did the interviewer ask you? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. What questions did you ask? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

3. What did you wear to the interview? \_\_\_\_\_

\_\_\_\_\_

4. What was the result of your interview? \_\_\_\_\_

\_\_\_\_\_

**COOPERATIVE EDUCATION INTERVIEW SUMMARY**

*Complete the following form for each interview in which you have participated while unemployed.*

Name of Business \_\_\_\_\_

Location \_\_\_\_\_

Position Applied for \_\_\_\_\_

Date of Interview \_\_\_\_\_

Interviewed by \_\_\_\_\_

Title \_\_\_\_\_

1. What questions did the interviewer ask you? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. What questions did you ask? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

3. What did you wear to the interview? \_\_\_\_\_

\_\_\_\_\_

4. What was the result of your interview? \_\_\_\_\_

\_\_\_\_\_

**COOPERATIVE EDUCATION  
REQUEST FOR JOB CHANGE**

NAME \_\_\_\_\_ TEACHER \_\_\_\_\_  
DATE \_\_\_\_\_ COURSE \_\_\_\_\_  
TRAINING STATION \_\_\_\_\_ PHONE # \_\_\_\_\_  
SUPERVISOR \_\_\_\_\_

**INSTRUCTIONS**

1. This form must be completed in full **BEFORE** you make a decision to change or leave your present job and before you approach your teacher-coordinator.
2. Schedule a conference with your teacher-coordinator. This conference will be held during your co-op period or at a time designated by your teacher-coordinator.
3. **FAILURE TO FOLLOW THIS PROCEDURE BEFORE LEAVING YOUR JOB WILL RESULT IN A FAILING GRADE FOR THE GRADING PERIOD AND POSSIBLE REMOVAL FROM THE PROGRAM.**

**PROCEDURE**

1. Turn in completed form to your teacher-coordinator.
2. Conference with your teacher-coordinator.
3. Teacher-coordinator will contact your employer.
4. Teacher-coordinator will contact your parent/guardian.
5. A mutual decision will be made by all parties involved.

**COMPLETE THE FOLLOWING:**

1. Explain your reasons for wanting to leave this job. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Explain the circumstances surrounding your decision. (Was this a one-time occurrence? Has the problem developed over time? etc.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. List 5 pros and cons regarding your job change.

PROS	CONS
1) _____	1) _____
2) _____	2) _____
3) _____	3) _____
4) _____	4) _____
5) _____	5) _____

## Cooperative Education Student Performance Appraisal Instrument

### SCANS Competencies and Foundation Skills

Student's Name: \_\_\_\_\_ School: \_\_\_\_\_

Training Station: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Teacher/Coordinator: \_\_\_\_\_ Connecting Course: \_\_\_\_\_

Please read each statement as it relates to the competency or foundation skill. Write the numerical score the student has earned in the spaces provided.

#### ***RATINGS RUBRIC FOR EVALUATING PERFORMANCE OF LEARNER***

- *Superior (94-100)*
- *Well Above Standard (90-93)*
- *Above Standard (85-89)*
- *At Standard (77-84)*
- *Not Applicable (NA)*
- *Below Standard (70-76)*
- *Unsatisfactory (Below 70)*

### **COMPETENCIES**

**SCORE      1. Resources: Identifies, organizes, plans and allocates resources**

- \_\_\_\_\_ A. Manages Time - Selects goal-relevant activities, ranks them, allocates time and prepares and follows schedules
- \_\_\_\_\_ B. Manages Money - Uses or prepares budgets, makes forecasts, keeps records and makes adjustments to meet objectives
- \_\_\_\_\_ C. Manages Material and Facilities - Acquires, stores, allocates and uses materials or space efficiently
- \_\_\_\_\_ D. Manages Human Resources - Assesses skills and distributes work accordingly, evaluates performance and provides feedback

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SCORE      2. Interpersonal: Works with others**

- \_\_\_\_\_ A. Participates as Member of a Team - Contributes to group effort
- \_\_\_\_\_ B. Teaches Others New Skills
- \_\_\_\_\_ C. Serves Clients/Customers - Works to satisfy customers' expectations

**Cooperative Education Student Performance Appraisal Instrument**  
**SCANS Competencies and Foundation Skills**

SCORE      **2. Interpersonal: Works with others (continued)**

- \_\_\_\_\_ D. Exercises Leadership - Communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies
- \_\_\_\_\_ E. Negotiates - Works toward agreements involving exchanges of resources, resolves divergent interests
- \_\_\_\_\_ F. Works with Diversity - Works well with men and women from diverse backgrounds

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SCORE      **3. Information: Acquires and uses information**

- \_\_\_\_\_ A. Acquires and Evaluates Information
- \_\_\_\_\_ B. Organizes and Maintains Information
- \_\_\_\_\_ C. Interprets and Communicates Information
- \_\_\_\_\_ D. Uses Computers to Process Information

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SCORE      **4. Systems: Understands complex interrelationships**

- \_\_\_\_\_ A. Understands Systems - Knows how social, organizational and technological systems work and operates effectively with them
- \_\_\_\_\_ B. Monitors and Corrects Performance - Distinguishes trends, predicts impacts on system operations, diagnoses systems' performance and corrects
- \_\_\_\_\_ C. Improves or Designs Systems - Suggests modifications to existing systems and develops new or alternative systems to improve performance

**Cooperative Education Student Performance Appraisal Instrument**  
**SCANS Competencies and Foundation Skills**

**4. Systems: Understands complex interrelationships (continued)**

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SCORE 5. Technology: Works with a variety of technologies**

- \_\_\_\_\_ A. Selects Technology - Chooses procedures, tools, or equipment including computers and related technologies
- \_\_\_\_\_ B. Applies Technology to Task- Understands overall intent and proper procedures for setup and operation of equipment
- \_\_\_\_\_ C. Maintains and Troubleshoots Equipment - Prevents, identifies or solves problems with equipment, including computers and other technologies

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Foundation Skills**

**SCORE 1. Basic Skills: Reads, writes, performs arithmetic and mathematical operations, listens and speaks**

- \_\_\_\_\_ A. Reading - Locates, understands and interprets written information in prose and in documents such as manuals, graphs, and schedules
- \_\_\_\_\_ B. Writing - Communicates thoughts, ideas, information, and messages in writing; and creates documents such as letters, directions, manuals, reports, graphs, and flow charts
- \_\_\_\_\_ C. Arithmetic/Mathematics - Performs basic computations and approaches practical problems by choosing appropriately from a variety of mathematical techniques
- \_\_\_\_\_ D. Listening - Receives, attends to, interprets, and responds to verbal messages and other cues
- \_\_\_\_\_ E. Speaking - Organizes ideas and communicates orally

**Cooperative Education Student Performance Appraisal Instrument**  
**SCANS Competencies and Foundation Skills**

SCORE      **1. Basic Skills: Reads, writes, performs arithmetic and mathematical operations, listens and speaks (continued)**

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SCORE      **2. Thinking Skills - Thinks creatively, makes decisions, solves problems, visualizes, knows how to learn, and reasons**

- \_\_\_\_\_ A. Creative Thinking - Generates new ideas
- \_\_\_\_\_ B. Decision Making - Specifies goals and constraints, generates alternatives, considers risks and evaluates and chooses best alternative
- \_\_\_\_\_ C. Problem Solving - Recognizes problems and devises and implements plan of action
- \_\_\_\_\_ D. Seeing Things in the Mind's Eye - Organizes and processes symbols, pictures, graphics, objects, and other information
- \_\_\_\_\_ E. Knowing How to Learn - Uses efficient learning techniques to acquire and apply new knowledge and skills
- \_\_\_\_\_ F. Reasoning - Discovers a rule or principle underlying the relationship between two or more objects and applies it when solving a problem

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SCORE      **3. Personal Qualities - Displays responsibility, self-esteem, sociability, self-management, integrity, and honesty**

- \_\_\_\_\_ A. Responsibility - Exerts a high level of effort and perseveres toward goal attainment
- \_\_\_\_\_ B. Self-Esteem - Believes in own self-worth and maintains a positive view of self
- \_\_\_\_\_ C. Sociability - Demonstrates understanding, friendliness, adaptability, empathy, and politeness in group setting

**Cooperative Education Student Performance Appraisal Instrument**  
**SCANS Competencies and Foundation Skills**

SCORE      **3. Personal Qualities - Displays responsibility, self-esteem, sociability, self-management, integrity, and honesty (continued)**

\_\_\_\_\_      D. Self-Management - Assesses self accurately, sets personal goals, monitors progress, and exhibits self-control

\_\_\_\_\_      E. Integrity/Honesty - Chooses ethical courses of action

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Evaluator's Summary Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Employee's Summary Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Marketing Teacher/Coordinator Summary Comments:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

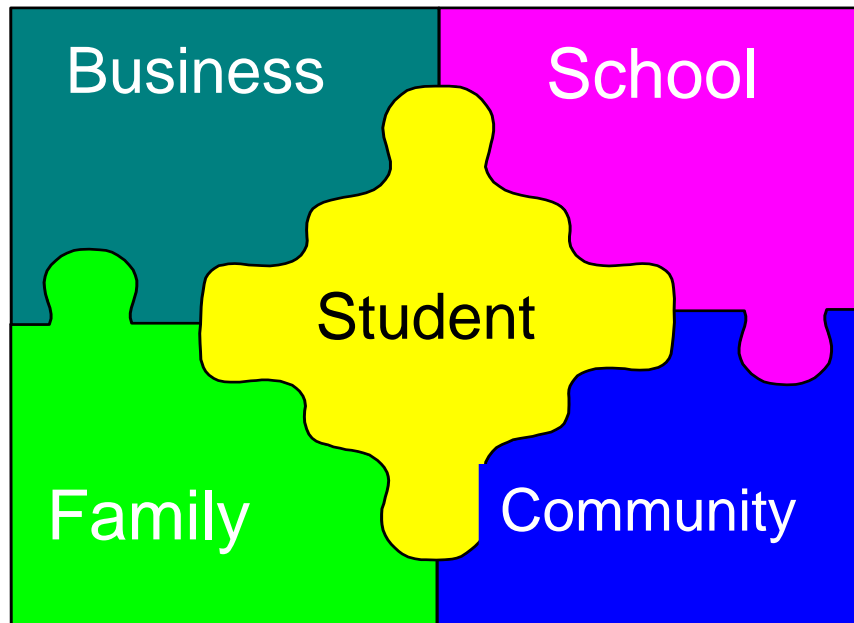
Evaluator's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Marketing Teacher Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please obtain a copy of:  
*“Applying Employment Laws: Youth Employment  
and Child Labor”* a document from the NC-  
Department of Labor

**MARKETING EDUCATION  
COOPERATIVE EDUCATION STUDENT'S  
TRAINING PORTFOLIO**  
*Associate Level*



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**STUDENT TRAINEE**

(SCHOOL NAME)  
(SCHOOL ADDRESS)  
(SCHOOL PHONE NUMBER)

# MARKETING EDUCATION AND THE COOPERATIVE METHOD OF INSTRUCTION

## *What is Cooperative Education?*

Cooperative education provides marketing-related work experience concurrent with academic studies. Not only will it enrich your education, it will help you make more informed career decisions. The program involves a cooperative effort between the employer and the school. You will develop confidence and time management skills through participation in cooperative education. Practical on-the-job training combined with classroom learning will better prepare you to meet the challenges of a changing technological society.

## *How will I relate what I learn in my marketing class to my job?*

- You will be responsible for completing two connecting activities per grading period. These activities will challenge you to apply basic marketing concepts learned in class to your specific training station.
- Periodic meetings will be held to explain the connecting activities and to answer questions on the subject matter covered in the activities. Four of these meetings are required of all cooperative education students.

## *How will I be evaluated?* Grades will be determined as follows:

- 40% Connecting activities:  
You are responsible for the successful completion of your training portfolio of connecting activities.
- 30% Employer evaluation:  
Your supervisor will evaluate you on basic work skills and job specific skills. This evaluation will be completed once per grading period.
- 20% Wage and hour forms:  
Complete and correct wage and hour forms must be submitted to your coordinator no later than the 5<sup>th</sup> of the month. These forms will serve as documentation and validation of your work experience. It is also documentation that you have worked the required hours. If the 5<sup>th</sup> of the month falls on a weekend, workday, or holiday, the wage and hour form will be due on the last school day prior to the 5<sup>th</sup> of the month. There will be a penalty of 10 points per day for late forms.
- 10% Attendance at required meetings:  
There will be one required meeting during the first week of school and one per GRADING PERIOD. You are expected to bring your latest check stub to these meetings. All meetings will be held during the time designated by your teacher-coordinator. Plan to remain the entire time.

Students will receive a grade of 100 for attending each required meeting. An unexcused absence from a required meeting will result in a grade of "0." In this case, the student is responsible for obtaining the information covered in the meeting from another co-op student.

Students will receive a grade of 100 for bringing their latest check stub to the required meeting. There will be a penalty of 10 points per day for late stubs. Stubs **WILL NOT** be checked during class, but must be shown to your teacher-coordinator during the required meeting. Late stubs should be shown to your teacher-coordinator either before 7:15 a.m. or during the time designated by your teacher-coordinator.

# ***SAMPLE***

## **MARKETING COOPERATIVE EDUCATION IMPORTANT DATES**

**NOTE: All meetings will be held during the time designated by your teacher-coordinator. Plan to remain the entire time.**

### **AUGUST, 2000**

Tuesday	August 15**	Required orientation to cooperative education
Wednesday	August 16**	Required orientation to cooperative education

\*\* Choose one date to attend.

### **SEPTEMBER, 2000**

Friday	September 8	Connecting Activity Due: Orientation to the Workplace
Friday	September 8	August wage and hour sheet due
Tuesday	September 12	<b>Required meeting – Bring latest check stub</b>

### **OCTOBER, 2000**

Tuesday	October 3	September wage and hour sheet due
Friday	October 6	Connecting Activity Due: Career Development
Tuesday	October 24	Help session – Marketing connecting activity

### **NOVEMBER, 2000**

Friday	November 3	October wage and hour sheet due
Wednesday	November 8	Connecting Activity Due: Marketing
Tuesday	November 14	<b>Required meeting – Bring latest check stub</b>

### **DECEMBER, 2000**

Friday	December 1	Help session – Economics connecting activity
Friday	December 1	November wage and hour sheet due
Friday	December 8	Connecting Activity Due: Economics

### **JANUARY, 2001**

Wednesday	January 3	December wage and hour sheet due
Tuesday	January 23	Help session – Selling connecting activity

## **FEBRUARY, 2001**

Friday	February 2	January wage and hour sheet due
Tuesday	February 13	<b>Required meeting</b> / Help session - Promotion – <b>Bring latest check stub</b>
Tuesday	February 13	Connecting Activity Due: Selling

## **MARCH, 2001**

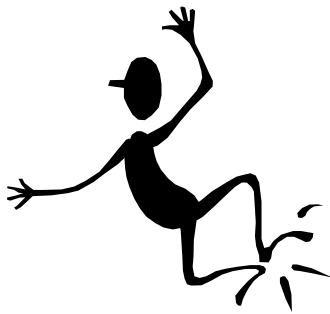
Friday	March 2	February wage and hour sheet due
Friday	March 9	Connecting Activity Due: Promotion

## **APRIL, 2001**

Wednesday	April 4	March wage and hour sheet due
Tuesday	April 10	<b>Required meeting</b> / Help session – Distribution – <b>Bring latest check stub</b>
Friday	April 27	Connecting Activity Due: Distribution

## **MAY, 2001**

Friday	May 4	April wage and hour sheet due
Wednesday	May 9	May wage and hour sheet due (hours to date)
Friday	May 18	Connecting Activity Due: Risk Management



<b>GRADING PERIOD 1 CONNECTING ACTIVITY #1:          ORIENTATION TO THE WORKPLACE          North Carolina Marketing Cooperative Education Program</b>
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Due Date: \_\_\_\_\_

To be successful in any job, you need to learn many basic facts about the company. You will prepare a job outline to assist you in organizing information about your place of employment and in analyzing the various duties and responsibilities of your job. The following information should be included:

POINTS

- I. Basic Facts About Your Training Station
  - A. General Information
    - 3 1. Name of business
    - 8 2. Correct address (including shopping center, zip code) and phone number
    - 6 3. Owner or manager's first and last name
    - 8 4. Immediate supervisor's first and last name (the person who will evaluate you)
    - 2 5. Name of your department
    - 5 6. Business hours of the training station
    - 5 7. Your general work schedule
    - 5 8. List the products and/or services offered for sale
  - B. Rules and Regulations of the Training Station
    - 3 1. Breaks: Lunch, dinner, general (Do you get them and when?)
    - 3 2. Dress code (What are the guidelines for employees?)
    - 3 3. Absences and tardiness (What procedures are you to follow and what are the consequences if you fail to do so?)
    - 4 4. Employee Benefits (Do you receive discounts, bonuses, vacation time, etc.?)
    - 5 5. Conduct
      - 2 a. Visits by friends (Are they allowed?)
      - 2 b. Phone usage (Can you use the phone while at work?)
      - 2 c. Use of tobacco products (Are you allowed to smoke?)
      - 2 d. Eating in work area (Are you allowed to eat on the job?)
    - 2 6. Employee meetings - Do you have regular meetings? How often?
    - 5 7. Shoplifting - What procedures do you follow if you suspect a customer of shoplifting?
- II. Duties and Responsibilities of Your Job
  - 10 A. List specific duties and responsibilities of your job - be as detailed as possible.
  - 5 B. How and when you are evaluated?
  - 5 C. The importance of your position to the operation of the business - Where do you fit in?
- 5 Correct Format Followed
- 5 Spelling/Neatness

*The outline may be typed or written neatly in ink.*

**EVALUATION FORM**  
**GRADING PERIOD 1 CONNECTING ACTIVITY #1:**  
**ORIENTATION TO THE WORKPLACE**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

Name \_\_\_\_\_

- The outline may be typed or written **neatly** in ink.
- The outline should be in outline format as shown with sections and each topic clearly labeled.
- Your job outline will be evaluated based on the following criteria:
  - ⇒ Level of Completion
  - ⇒ Neatness

3	_____	Name of business
8	_____	Correct address (including zip code) and phone number
6	_____	Owner or manager's name
8	_____	Immediate supervisor's name
2	_____	Name of your department
5	_____	Business hours of the training station
5	_____	Your work schedule
5	_____	Products and services
3	_____	Breaks
3	_____	Dress code
3	_____	Absences and tardiness
4	_____	Benefits
2	_____	Visits by others
2	_____	Phone usage
2	_____	Use of tobacco products
2	_____	Eating in work area
2	_____	Employee meetings
5	_____	Shoplifting
10	_____	List specific duties and responsibilities of your job
5	_____	How and when you are evaluated
5	_____	The importance of your position to the operation of the business
5	_____	Correct format followed
5	_____	Spelling/Neatness
	_____	TOTAL POINTS EARNED
	_____	LESS: PENALTY FOR LATE WORK (10 points per day)
	_____	FINAL GRADE

**\*\*\*REMINDER\*\*\***

***YOU WILL BE REQUIRED TO COMPLETE AN OUTLINE FOR EACH JOB  
 YOU HAVE DURING THE SCHOOL YEAR!!***

**GRADING PERIOD 1 CONNECTING ACTIVITY #2:  
CAREER DEVELOPMENT  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Career Development connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Set personal goals.	<ul style="list-style-type: none"> <li>◆ Conduct an interview with the top manager at your training station. Use the interview form provided and complete in your own handwriting.</li> </ul>
Conduct a job search.	<p>Investigate the hiring policies and procedures used by your training station.</p> <ul style="list-style-type: none"> <li>◆ Explain any pre-employment testing required.</li> <li>◆ Describe your interview with the company, giving examples of the questions asked.</li> <li>◆ Enclose a blank copy of the current job application form used by your training station.</li> </ul>

I.       JOB INTERVIEW FORM

II.      HIRING POLICIES/PROCEDURES

- A.      Pre-employment testing required by the company
- B.      Description of your interview
- C.      Copy of job application

**GRADING PERIOD 1 CONNECTING ACTIVITY #2:**  
**CAREER DEVELOPMENT**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

**INTERVIEW FORM**

Student: \_\_\_\_\_ Date of Interview: \_\_\_\_\_

Person Interviewed: \_\_\_\_\_

Job Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature of Interviewee: \_\_\_\_\_

How long have you worked for this company?

\_\_\_\_\_

How long have you worked in this field?

\_\_\_\_\_

How did you become involved in this field?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are the major tasks involved in your job?

\_\_\_\_\_

\_\_\_\_\_

What is the most challenging aspect of your job and why?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What do you enjoy most about your job and why?

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What do you enjoy least about your job and why?

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What skills and qualities are absolutely essential for a person in this field?

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What educational background, certification, training, licensing, or other qualifications are important for someone wishing to enter this field?

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What is the typical career path for someone working their way up through the company?

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What important challenges is the company facing now or in the near future?

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What advice would you give to a high school student who wishes to pursue a career in this field?

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Would you be interested in speaking to Marketing classes about careers in your industry? \_\_\_\_\_

**Remember to thank the interviewee!**



**EVALUATION FORM**  
**GRADING PERIOD 1 CONNECTING ACTIVITY #2: CAREER DEVELOPMENT**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

**NAME** \_\_\_\_\_

***INTERVIEW***

Points Possible	Points Earned	Activity
4	_____	Basic Information
4	_____	How long have you worked for this company?
4	_____	How long have you worked in this field?
6	_____	How did you become involved in this field?
6	_____	What are the major tasks involved in your job?
6	_____	What is the most challenging aspect of your job and why?
6	_____	What do you enjoy most about your job and why?
6	_____	What do you enjoy least about your job and why?
6	_____	What skills and qualities are essential for a person in this field?
6	_____	What educational backgrounds . . . are important?
6	_____	What is the typical career path for someone . . .?
6	_____	What important challenges is the company facing?
6	_____	What advice would you give to a high school student?
4	_____	Would you be interested in speaking to Marketing classes?

***HIRING POLICIES/PROCEDURES***

Points Possible	Points Earned	Activity
8	_____	Explain required pre-employment testing
8	_____	Describe your employment interview
8	_____	Copy of company's job application enclosed
100	_____	<b>TOTAL POINTS EARNED</b>
	_____	<b>LESS: Penalty for late work (10 points per day) Date Submitted</b> _____
	_____	<b>FINAL GRADE</b>

**GRADING PERIOD 2 CONNECTING ACTIVITY #1: MARKETING**  
**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Marketing connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Explain the concept of market and market identification.	Investigate marketing techniques used by your training station. <ul style="list-style-type: none"> <li>◆ Summarize the demographic, psychographic, geographic, and behavioral characteristics of its typical customer.</li> <li>◆ Summarize how product, price, promotion, and place are used to attract that market.</li> </ul>
Explain the marketing functions and related activities.	<ul style="list-style-type: none"> <li>◆ Discuss with your employer how the 9 marketing functions are performed in your training station.</li> </ul>
Explain the types of business ownership.	<ul style="list-style-type: none"> <li>◆ Describe the form of business ownership under which your business operates.</li> <li>◆ In your opinion, is this the best form of ownership for the company?               <ul style="list-style-type: none"> <li>☞ If yes, explain why and discuss the advantages it receives from operating under this type of ownership.</li> <li>☞ If no, which form would you recommend; explain your reasons for choosing that form and discuss the advantages you think the company will receive.</li> </ul> </li> </ul>

- I. CUSTOMER CHARACTERISTICS
- A. Demographic Characteristics
  - B. Psychographic Characteristics
  - C. Geographic Characteristics
  - D. Behavioral Characteristics

- II. MARKETING STRATEGIES USED TO REACH THE TARGET MARKET
- A. Product Decisions
  - B. Price Decisions
  - C. Promotion Decisions
  - D. Place Decisions

- III. MARKETING FUNCTIONS
- A. Distribution
  - B. Financing
  - C. Marketing Information Management
  - D. Pricing
  - E. Product/Service Planning
  - F. Promotion
  - G. Purchasing
  - H. Risk Management
  - I. Selling

- IV. BUSINESS OWNERSHIP
- A. Type of ownership
  - B. Analysis of ownership

**GRADING PERIOD 2 CONNECTING ACTIVITY #1: MARKETING**  
**North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

**I. CUSTOMER CHARACTERISTICS**

A. Demographic Characteristics \_\_\_\_\_

\_\_\_\_\_

B. Psychographic Characteristics \_\_\_\_\_

\_\_\_\_\_

C. Geographic Characteristics \_\_\_\_\_

\_\_\_\_\_

D. Behavioral Characteristics \_\_\_\_\_

\_\_\_\_\_

**II. MARKETING STRATEGIES USED**

A. Product Decisions \_\_\_\_\_

\_\_\_\_\_

B. Price Decisions \_\_\_\_\_

\_\_\_\_\_

C. Promotion Decisions \_\_\_\_\_

\_\_\_\_\_

D. Place Decisions \_\_\_\_\_

\_\_\_\_\_

**MARKETING FUNCTIONS**

A. Distribution \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

B. Financing \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- C. Marketing Information Management \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- D. Pricing \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- E. Product/Service Planning \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- F. Promotion \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- G. Purchasing \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- H. Risk Management \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- I. Selling \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

III. BUSINESS OWNERSHIP

- A. Type of Ownership \_\_\_\_\_  
\_\_\_\_\_
- B. Analysis (Is this the best form of ownership for the company? Explain your answer and discuss advantages to the company.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**EVALUATION FORM**  
**GRADING PERIOD 2 CONNECTING ACTIVITY #1: MARKETING**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

Points Possible	Points Earned	Activity
<b><i>CUSTOMER CHARACTERISTICS</i></b>		
5	_____	Demographic Characteristics
5	_____	Psychographic Characteristics
5	_____	Geographic Characteristics
5	_____	Behavioral Characteristics
<b><i>MARKETING STRATEGIES USED</i></b>		
5	_____	Product Strategies
5	_____	Price Strategies
5	_____	Promotion Strategies
5	_____	Place Strategies
<b><i>MARKETING FUNCTIONS</i></b>		
5	_____	Distribution
5	_____	Financing
5	_____	Marketing Information Management
5	_____	Pricing
5	_____	Product/Service Planning
5	_____	Promotion
5	_____	Purchasing
5	_____	Risk Management
5	_____	Selling
<b><i>BUSINESS OWNERSHIP</i></b>		
5	_____	Type of ownership
10	_____	Analysis of ownership
100	_____	<b>TOTAL POINTS EARNED</b>
	_____	<b>LESS: Penalty for late work (10 points per day) Date Submitted _____</b>
	_____	<b>FINAL GRADE</b>

**GRADING PERIOD 2 CONNECTING ACTIVITY #2: ECONOMICS**  
**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Economics connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Explain the concept of supply and demand.	Choose 5 products sold by your training station. <ul style="list-style-type: none"> <li>◆ Determine whether each product has relatively elastic or inelastic demand.</li> <li>◆ Explain the factors (as discussed in class) that affect the elasticity of demand for each product.</li> </ul>
Explain the concept of utility.	<ul style="list-style-type: none"> <li>◆ Explain how your training station provides time utility, place utility, and possession utility for its customers.</li> <li>◆ Give specific examples to justify your answers.</li> </ul>
Explain the concepts and characteristics of private enterprise: Competition.	<ul style="list-style-type: none"> <li>◆ List your training station's 3 major competitors relative to its location. Be specific and explain why they are considered a major competitor.</li> <li>◆ Describe the use of price and non-price competition by your training station. Give specific examples.</li> </ul>
Explain the concepts and characteristics of private enterprise: Government Involvement.	<ul style="list-style-type: none"> <li>◆ Make a list of at least 5 examples of government involvement at your place of business.</li> <li>◆ Write an explanation beside each example explaining why the government might feel the need to be involved in this situation.</li> </ul>

**GRADING PERIOD 2 CONNECTING ACTIVITY #2: ECONOMICS**  
**North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

***SUPPLY AND DEMAND***

<b>PRODUCT</b>	<b>ELASTIC / INELASTIC</b>	<b>FACTORS</b>
1.		
2.		
3.		
4.		
5.		

***UTILITY***

<b>TYPE</b>	<b>EXPLANATION</b>	<b>EXAMPLES</b>
Time		
Place		
Possession		

**MAJOR COMPETITORS**

MAJOR COMPETITOR	EXPLANATION
1.	
2.	
3.	

**PRICE COMPETITION**

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**NON-PRICE COMPETITION**

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**GOVERNMENT INVOLVEMENT**

EXAMPLE	EXPLANATION
1.	
2.	
3.	
4.	
5.	

**EVALUATION FORM**  
**GRADING PERIOD 2 CONNECTING ACTIVITY #2: ECONOMICS**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

**SUPPLY AND DEMAND**

Product #	Elastic/Inelastic Classification		Factors Affecting Elasticity		<b>TOTAL</b>
	Points Possible	Points Earned	Points Possible	Points Earned	
1.	3	_____	2	_____	_____
2.	3	_____	2	_____	
3.	3	_____	2	_____	
4.	3	_____	2	_____	
5.	3	_____	2	_____	

**UTILITY**

Type	Explanation		Examples		<b>TOTAL</b>
	Points Possible	Points Earned	Points Possible	Points Earned	
Time	4	_____	2	_____	_____
Place	4	_____	2	_____	
Possession	4	_____	2	_____	

**MAJOR COMPETITORS**

Competitor #	Points Possible	Points Earned	Activity	<b>TOTAL</b>
	1.	6		
2.	6	_____	Explanation	
3.	6	_____	Explanation	

**PRICE COMPETITION**

Points Possible: 4

\_\_\_\_\_

**NON-PRICE COMPETITION**

Points Possible: 5

\_\_\_\_\_

**GOVERNMENT INVOLVEMENT**

Example #	Points Possible	Points Earned	Activity	<b>TOTAL</b>
	1.	6		
2.	6	_____	Explanation	
3.	6	_____	Explanation	
4.	6	_____	Explanation	
5.	6	_____	Explanation	

**TOTAL POINTS EARNED**

\_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

\_\_\_\_\_

**FINAL GRADE**

\_\_\_\_\_

**GRADING PERIOD 3 CONNECTING ACTIVITY #1: SELLING**  
**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Selling connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Explain the purpose and importance of selling.	<ul style="list-style-type: none"> <li>◆ Identify the positions in your training station that require selling skills.</li> <li>◆ Explain briefly how each position uses selling skills.</li> </ul>
Explain the buying/selling process.	<p>Choose 5 different products offered at your training station.</p> <ul style="list-style-type: none"> <li>◆ For each product, identify the rational and emotional buying motives that may stimulate customers to buy that product.</li> </ul>
Explain the nature of and facilitate positive customer/client relations.	<ul style="list-style-type: none"> <li>◆ Explain a situation in which you had to handle a difficult customer.</li> <li>◆ Analyze your actions and whether you could have handled the situation in a more productive and positive manner.</li> <li>◆ Explain the effects of your actions on the business.</li> </ul>
Explain and demonstrate the steps of a sale.	<p>Choose 3 products offered at your training station.</p> <ul style="list-style-type: none"> <li>◆ For each product list 3 features and their related benefit(s) to the customer.</li> </ul>
Process special transactions in marketing that are essential to offering customer/client services.	<ul style="list-style-type: none"> <li>◆ Determine which of the following special transactions are offered to customers at your training station: Layaway, Refunds/Exchanges, Coupons, and Gift Certificates. Explain the company's policy with regard to each type of transaction.</li> </ul>

- I. POSITIONS REQUIRING SELLING SKILLS
- II. BUYING MOTIVES
- III. DIFFICULT CUSTOMER SITUATION
  - A. Description of situation
  - B. Analysis of situation
  - C. Effect on company
- IV. FEATURE/BENEFIT CHARTS
- V. SPECIAL TRANSACTIONS

**GRADING PERIOD 3 CONNECTING ACTIVITY #1: SELLING**  
**North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

*POSITIONS REQUIRING SELLING SKILLS*

Position/Explanation \_\_\_\_\_

Position/Explanation \_\_\_\_\_

Position/Explanation \_\_\_\_\_

*BUYING MOTIVES*

<b>PRODUCT</b>	<b>RATIONAL MOTIVES</b>	<b>EMOTIONAL MOTIVES</b>
1.		
2.		
3.		
4.		
5.		

*DIFFICULT CUSTOMER SITUATION*

Description of Situation \_\_\_\_\_

Analysis of Your Actions \_\_\_\_\_

Effect on Company \_\_\_\_\_

**FEATURE/BENEFIT CHART**

<b>PRODUCT</b>	<b>FEATURE</b>	<b>BENEFIT</b>
#1	1.	1.
	2.	2.
	3.	3.
#2	1.	1.
	2.	2.
	3.	3.
#3	1.	1.
	2.	2.
	3.	3.

**SPECIAL TRANSACTIONS**

<b>TRANSACTION</b>	<b>YES</b>	<b>NO</b>	<b>EXPLANATION</b>
<b>Layaway</b>			
<b>Refunds/Exchanges</b>			
<b>Coupons</b>			
<b>Gift Certificates</b>			

**EVALUATION FORM**  
**GRADING PERIOD 3 CONNECTING ACTIVITY #1: SELLING**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

**TOTAL**

**POSITIONS REQUIRING SELLING SKILLS**      **Points Possible: 10**      \_\_\_\_\_

**BUYING MOTIVES**

Product #	<b>Rational Motives</b>		<b>Emotional Motives</b>		<b><u>TOTAL</u></b>
	Points Possible	Points Earned	Points Possible	Points Earned	
1.	2	_____	2	_____	
2.	2	_____	2	_____	
3.	2	_____	2	_____	
4.	2	_____	2	_____	
5.	2	_____	2	_____	_____

**DIFFICULT CUSTOMER SITUATION**

Points Possible	Points Earned	Activity	<b><u>TOTAL</u></b>
8	_____	Description of situation	
8	_____	Analysis of situation	
8	_____	Effect of company	_____

**FEATURE/BENEFIT CHART**

Product #	<b>Features</b>		<b>Benefits</b>		<b><u>TOTAL</u></b>
	Points Possible	Points Earned	Points Possible	Points Earned	
1.	6	_____	6	_____	
2.	6	_____	6	_____	
3.	6	_____	6	_____	_____

**SPECIAL TRANSACTIONS**

Transaction Type	Points Possible	Points Earned	<b><u>TOTAL</u></b>
Layaway	2.5	_____	
Refunds/Exchanges	2.5	_____	
Coupons	2.5	_____	
Gift Certificates	2.5	_____	_____

100      **TOTAL POINTS EARNED**      \_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

**FINAL GRADE**      \_\_\_\_\_

**GRADING PERIOD 3 CONNECTING ACTIVITY #2: PROMOTION**  
**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Promotion connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Explain the types of promotion: Advertising	Explain how your company uses advertising. <ul style="list-style-type: none"> <li>◆ Collect 2 examples of print advertising by the company.</li> <li>◆ In what publication did each ad appear?</li> <li>◆ Who develops the print ads for your company?</li> <li>◆ Does your company use broadcast advertising? What type?  <ul style="list-style-type: none"> <li>☞ If so, complete the Broadcast Ad form.</li> </ul> </li> </ul>
Explain the types of promotion: Sales Promotion	<ul style="list-style-type: none"> <li>◆ Who plans and organizes the sales promotion activities?</li> <li>◆ List the sales promotion activities used by your training station.</li> </ul>
Explain the types of promotion: Publicity	<ul style="list-style-type: none"> <li>◆ Explain how your training station uses publicity.</li> <li>◆ Bring in an example of a news release or article and explain whether the publicity was positive or negative.</li> </ul>
Explain public relations activities	<ul style="list-style-type: none"> <li>◆ Explain the employee relations activities sponsored by your company.</li> <li>◆ Explain the community relations activities in which your company is involved.</li> <li>◆ Who determines in which community activities the company participates?</li> </ul>

- I.     **ADVERTISING**
  - A.     2 print ads
  - B.     Developer of ads
  - C.     Broadcast ad use – complete form if necessary
  
- II.    **SALES PROMOTION**
  - A.     Person responsible for sales promotion
  - B.     List of sales promotion activities
  
- III.   **PUBLICITY**
  - A.     Explanation
  - B.     Example of news release or article
  - C.     Explanation of news release or article
  
- IV.    **PUBLIC RELATIONS**
  - A.     Employee relations activities
  - B.     Community relations activities
  - C.     Person responsible for community relations

***You must obtain your supervisor's signature on this assignment.***

**GRADING PERIOD 3 CONNECTING ACTIVITY #2: PROMOTION**  
**North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

***ADVERTISING***

Attach two (2) print advertisements

In what publication did each ad appear?

Ad #1 \_\_\_\_\_

Ad #2 \_\_\_\_\_

Who develops the print advertising for your company? \_\_\_\_\_

\_\_\_\_\_

Does your company use broadcast advertising?

No \_\_\_\_\_

Yes \_\_\_\_\_ What kind? \_\_\_\_\_ (Complete Broadcast Ad form)

***SALES PROMOTION***

Who develops the sales promotion activities for your company? \_\_\_\_\_

\_\_\_\_\_

List sales promotion activities used by your training station.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

***PUBLICITY***

How does your training station use publicity? \_\_\_\_\_

\_\_\_\_\_

Attach example of a news release or article.

Explain whether the news release or article was positive or negative. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

***PUBLIC RELATIONS***

Explain the employee relations activities sponsored by your company. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Explain the community relations activities sponsored by your company. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Who determines the activities of the community in which the company sponsors/participates?

\_\_\_\_\_

Company Representative Name (printed) \_\_\_\_\_

Company Representative Signature \_\_\_\_\_

Company Representative Title \_\_\_\_\_

**GRADING PERIOD 3 CONNECTING ACTIVITY #2: PROMOTION  
BROADCAST ADVERTISING  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

CHOOSE ONE BROADCAST AD TO ANALYZE. COMPLETE THE FORM BASED ON THE CHOSEN AD.

GENERAL CONTENT OF AD \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

TYPE OF MEDIA                    \_\_\_\_\_ Radio                    \_\_\_\_\_ Television

STATION CALL LETTERS \_\_\_\_\_  
 (Include all applicable stations)

TARGET MARKET OF AD \_\_\_\_\_  
 \_\_\_\_\_

FREQUENCY OF AD ON EACH STATION

STATION	FREQUENCY	TIME SLOTS

PURPOSE OF AD \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**EVALUATION FORM**  
**GRADING PERIOD 3 CONNECTING ACTIVITY #2: PROMOTION**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

**NAME** \_\_\_\_\_

- 93-100      The four types of promotion are addressed. The types of promotion used by the training station are described in detail. Examples are thoroughly described, categorized and several printed samples are attached when applicable. Employee relations activities are described in detail and examples are given. Information is accurate for the individual training station as evidenced by a manager's signature. The details, analysis, and explanations provide evidence that the student possesses a complete understanding of the role of promotion in the training station's marketing strategy. The assignment is neat and virtually free of errors in spelling, punctuation, and grammar.
- 85-92      The four types of promotion are addressed. The types of promotion used by the training station are described in some detail. Examples are given, categorized, and some printed samples are attached when applicable. Employee relations activities are described; examples may or may not be given. The majority of the information is accurate for the individual training station, and someone from the business has signed the assignment. The details, analysis, and explanations provide evidence that the student possesses an adequate understanding of the role of promotion in the training station's marketing strategy. The assignment is neat and contains few, if any, errors in spelling, punctuation, and grammar.
- 77-84      The four types of promotion may or may not be addressed. The types of promotion used by the training station are mentioned, though detail may be absent. Examples may be included, although they may or may not be categorized. At least one printed sample is attached when applicable. Employee relations activities are mentioned; examples may or may not be given. Most of the information is accurate for the individual training station, though it may contain some inconsistencies. Someone from the business has signed the assignment. The details, analysis, and explanations provide evidence that the student possesses some understanding of the role of promotion in the training station's marketing strategy, though inconsistencies may be present. The assignment may lack neatness and contain errors in spelling, punctuation, and grammar.
- 70-76      The four types of promotion may or may not be addressed. The types of promotion used by the training station are mentioned, though detail is absent. Few, if any, examples are to be included, and may or may not be categorized. At least one printed sample is attached when applicable. Employee relations activities are mentioned; examples may or may not be given. Most of the information is accurate for the individual training station, though it may contain some inconsistencies. Someone from the business has signed the assignment. The details, analysis, and explanations provide evidence that the student possesses some understanding of the role of promotion in the training station's marketing strategy, though inconsistencies may be present. The assignment may lack neatness and contain many errors in spelling, punctuation, and grammar.
- Below 70      Assignment is unacceptable.

\_\_\_\_\_ **TOTAL POINTS EARNED**  
 \_\_\_\_\_ **LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_  
 \_\_\_\_\_ **FINAL GRADE**

**COMMENTS** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**GRADING PERIOD 4 CONNECTING ACTIVITY #1: DISTRIBUTION**  
**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Distribution connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Explain the physical distribution process.	<ul style="list-style-type: none"> <li>◆ Describe the channel of distribution for your company.</li> <li>◆ Draw the channel of distribution.</li> </ul>
Explain storing considerations.	<ul style="list-style-type: none"> <li>◆ Describe where products are stored prior to sale and explain why this method of storage is necessary. (Example: Private warehouse, distribution center, etc.)</li> </ul>
Explain the receiving process.	<ul style="list-style-type: none"> <li>◆ Describe how merchandise is received and checked at your work site.</li> </ul>
Explain the marking methods.	<ul style="list-style-type: none"> <li>◆ Describe how stock is marked at your training station.</li> </ul>

I. CHANNEL OF DISTRIBUTION

- A. Describe
- B. Draw

II. STORING CONSIDERATIONS

- A. Location(s) of storage
- B. Justification of storage decisions

III. INVENTORY CONTROL PROCESS

- A. Description of receiving process
- B. Description of marking methods

**GRADING PERIOD 4 CONNECTING ACTIVITY #1: DISTRIBUTION**  
**North Carolina Marketing Cooperative Education Program**

Name \_\_\_\_\_

Training Station \_\_\_\_\_

Course \_\_\_\_\_

Due Date \_\_\_\_\_

***CHANNEL OF DISTRIBUTION***

Describe the channel of distribution for your company \_\_\_\_\_

---

---

---

Draw your company's channel of distribution below.

***STORING CONSIDERATIONS***

Where are your company's products stored prior to sale? \_\_\_\_\_

---

Why is this an appropriate method of storage for your company? \_\_\_\_\_

---

---

---

***INVENTORY CONTROL PROCESS***

Who is responsible for verifying the quantity and condition of merchandise received by your company? \_\_\_\_\_

---

Which method is used by your company to check merchandise received?

Blind check \_\_\_\_\_      Direct check \_\_\_\_\_      Dummy invoice check \_\_\_\_\_

Spot check \_\_\_\_\_      Other (explain) \_\_\_\_\_

Which method(s) of marking stock does your company use?

UPCs \_\_\_\_\_      Source marking \_\_\_\_\_      Preretailing marking \_\_\_\_\_

Other (explain) \_\_\_\_\_

**EVALUATION FORM**  
**GRADING PERIOD 4 CONNECTING ACTIVITY #1: DISTRIBUTION**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

*Points will be earned based on the following:*

- Thorough description of the issue at your training station*
- Accuracy of the information*
- Use and application of correct terminology relating to distribution*
- Neatness*
- Correct grammar, punctuation, and spelling*

**CHANNEL OF DISTRIBUTION**

Points Possible	Points Earned	Activity
-----------------	---------------	----------

---

- |    |       |  |
|----|-------|--|
| 20 | _____ | Describe your training station’s channel of distribution.      |
| 20 | _____ | Draw the channel(s) of distribution for your training station. |

**STORING CONSIDERATIONS**

Points Possible	Points Earned	Activity
-----------------	---------------	----------

---

- |    |       |  |
|----|-------|--|
| 10 | _____ | Describe the location of your training station’s storage facilities. |
| 20 | _____ | Justify the storage decisions made for your training station.        |

**INVENTORY CONTROL PROCESS**

Points Possible	Points Earned	Activity
-----------------	---------------	----------

---

- |    |       |  |
|----|-------|--|
| 15 | _____ | Describe your training station’s receiving process.        |
| 15 | _____ | Describe your training station’s methods of marking stock. |

100	_____	<b>TOTAL POINTS EARNED</b>
	_____	<b>LESS: Penalty for late work (10 points per day) Date Submitted _____</b>
	_____	<b>FINAL GRADE</b>

**GRADING PERIOD 4 CONNECTING ACTIVITY #2:  
RISK MANAGEMENT  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Risk Management connecting activities should be placed behind this page.*

Marketing Competency	Assignment
Explain methods of preventing shoplifting and procedures for handling accidents.	<ul style="list-style-type: none"> <li>◆ Describe the methods used in your training station to prevent shoplifting/theft.</li> <li>◆ Report on the accident procedures used in your training station. Be specific.</li> </ul>
Explain and use safety precautions.	<ul style="list-style-type: none"> <li>◆ Describe the training that your company's employees receive on safety and security.</li> </ul>

- I. SHOPLIFTING AND ACCIDENT PROCEDURES
  - A. Description of shoplifting prevention methods
  - B. Description of accident procedures
  
- II. TRAINING
  - A. Safety procedures
  - B. Security procedures





<b>EVALUATION FORM</b> <b>GRADING PERIOD 4 CONNECTING ACTIVITY #2: RISK MANAGEMENT</b> <b>North Carolina Marketing Cooperative Education Program</b> <b>Due: _____</b>
---

NAME \_\_\_\_\_

*Points will be earned based on the following:*

- Thorough description of the issue at your training station*
- Accuracy of the information*
- Use and application of correct terminology relating to safety and security*
- Neatness*
- Correct grammar, punctuation, and spelling*

**SHOPLIFTING and ACCIDENT PROCEDURES**

Points Possible	Points Earned	Activity
25	_____	Describe your training station's methods of preventing shoplifting.
25	_____	Describe the procedures for handling accidents at your training station.

**TRAINING**

Points Possible	Points Earned	Activity
25	_____	Describe the training that employees receive on safety procedures.
25	_____	Describe the training that employees receive on security procedures.
100	_____	<b>TOTAL POINTS EARNED</b>
	_____	<b>LESS: Penalty for late work (10 points per day) Date Submitted _____</b>
	_____	<b>FINAL GRADE</b>

## RESOURCES

Farese, Lois S., Kimbrell, Grady, and Woloszyk, Carl A. Marketing Essentials, Glencoe/McGraw-Hill Publishing Company, Lake Forest, Ill., 1997.

**MARKETING EDUCATION  
COOPERATIVE EDUCATION STUDENT'S  
TRAINING PORTFOLIO**  
*Management Level*



---

**STUDENT TRAINEE**

(SCHOOL NAME)  
(SCHOOL ADDRESS)  
(SCHOOL PHONE NUMBER)

# MARKETING EDUCATION AND THE COOPERATIVE METHOD OF INSTRUCTION

## *What is Cooperative Education?*

Cooperative education provides marketing-related work experience concurrent with academic studies. Not only will it enrich your education, it will help you make more informed career decisions. The program involves a cooperative effort between the employer and the school. You will develop confidence and time management skills through participation in cooperative education. Practical on-the-job training combined with classroom learning will better prepare you to meet the challenges of a changing technological society.

## *How will I relate what I learn in my marketing class to my job?*

- You will be responsible for completing two connecting activities per grading period. These activities will challenge you to apply basic marketing concepts learned in class to your specific training station.
- Periodic meetings will be held to explain the connecting activities and to answer questions on the subject matter covered in the activities. Four of these meetings are required of all cooperative education students.

## *How will I be evaluated?* Grades will be determined as follows:

- 40% Connecting activities:  
You are responsible for the successful completion of your training portfolio of connecting activities.
- 30% Employer evaluation:  
Your supervisor will evaluate you on basic work skills and job specific skills. This evaluation will be completed once per grading period.
- 20% Wage and hour forms:  
Complete and correct wage and hour forms must be submitted to your coordinator no later than the 5<sup>th</sup> of the month. These forms will serve as documentation and validation of your work experience. It is also documentation that you have worked the required hours. If the 5<sup>th</sup> of the month falls on a weekend, workday, or holiday, the wage and hour form will be due on the last school day prior to the 5<sup>th</sup> of the month. There will be a penalty of 10 points per day for late forms.
- 10% Attendance at required meetings:  
There will be one required meeting during the first week of school and one per GRADING PERIOD. You are expected to bring your latest check stub to these meetings. All meetings will be held during the time designated by your teacher-coordinator. Plan to remain the entire time.

Students will receive a grade of 100 for attending each required meeting. An unexcused absence from a required meeting will result in a grade of "0." In this case, the student is responsible for obtaining the information covered in the meeting from another co-op student.

Students will receive a grade of 100 for bringing their latest check stub to the required meeting. There will be a penalty of 10 points per day for late stubs. Stubs **WILL NOT** be checked during class, but must be shown to your teacher-coordinator during the required meeting. Late stubs should be shown to your teacher-coordinator either before 7:15 a.m. or during the time designated by your teacher-coordinator.

# ***SAMPLE***

## **MARKETING COOPERATIVE EDUCATION IMPORTANT DATES**

**NOTE: All meetings will be held during the time designated by your teacher-coordinator. Plan to remain the entire time.**

### **AUGUST, 2000**

Tuesday	August 15**	Required orientation to cooperative education
Wednesday	August 16**	Required orientation to cooperative education

\*\* Choose one date to attend.

### **SEPTEMBER, 2000**

Friday	September 8	Connecting Activity Due: Orientation to the Workplace
Friday	September 8	August wage and hour sheet due
Tuesday	September 12	<b>Required meeting – Bring latest check stub</b>

### **OCTOBER, 2000**

Tuesday	October 3	September wage and hour sheet due
Friday	October 6	Connecting Activity Due: Career Development
Tuesday	October 24	Help session–Product/Service Planning connecting activity

### **NOVEMBER, 2000**

Friday	November 2	October wage and hour sheet due
Wednesday	November 8	Connecting Activity Due: Product/Service Planning
Tuesday	November 14	<b>Required meeting – Bring latest check stub</b>

### **DECEMBER, 2000**

Friday	December 1	Help session – Marketing Information Management connecting activity
Friday	December 1	November wage and hour sheet due
Friday	December 8	Connecting Activity Due: Marketing Information Management

### **JANUARY, 2001**

Wednesday	January 3	December wage and hour sheet due
Tuesday	January 23	Help session – Pricing connecting activity

## FEBRUARY, 2001

Friday	February 2	January wage and hour sheet due
Tuesday	February 13	<b>Required meeting</b> / Help session – Promotion connecting activity – <b>Bring latest check stub</b>
Tuesday	February 13	Connecting Activity Due: Pricing

## MARCH, 2001

Friday	March 2	February wage and hour sheet due
Friday	March 9	Connecting Activity Due: Promotion

## APRIL, 2001

Wednesday	April 4	March wage and hour sheet due
Tuesday	April 10	<b>Required meeting</b> / Help session – Purchasing connecting activity – <b>Bring latest check stub</b>
Friday	April 28	Connecting Activity Due: Purchasing

## MAY, 2001

Friday	May 4	April wage and hour sheet due
Wednesday	May 9	May wage and hour sheet due (hours to date)
Friday	May 18	Connecting Activity Due: Financial Management



<b>GRADING PERIOD 1 CONNECTING ACTIVITY #1:</b> <b>ORIENTATION TO THE WORKPLACE</b> <b>North Carolina Marketing Cooperative Education Program</b>
---

Due Date: \_\_\_\_\_

To be successful in any job, you need to learn many basic facts about the company. You will prepare a job outline to assist you in organizing information about your place of employment and in analyzing the various duties and responsibilities of your job. The following information should be included:

POINTS

- |    |            |   |
|----|------------|---|
|    | <b>I.</b>  | <b>Basic Facts About Your Training Station</b>  |
|    | <b>A.</b>  | <b>General Information</b>  |
| 3  |            | 1. Name of business   |
| 8  |            | 2. Correct address (including shopping center, zip code) and phone number   |
| 6  |            | 3. Owner or manager's first and last name   |
| 8  |            | 4.. Immediate supervisor's first and last name (the person who will evaluate you)                                 |
| 2  |            | 5. Name of your department  |
| 6  |            | 6. Draw an organizational chart for your company from the regional level downward                                 |
| 2  |            | 7. Business hours of the training station   |
| 2  |            | 8. Your general work schedule   |
| 5  |            | 9.. List the products and/or services offered for sale  |
|    | <b>B.</b>  | <b>Rules and Regulations of the Training Station</b>  |
| 3  |            | 1. Breaks: Lunch, dinner, general (Do you get them and when?)   |
| 3  |            | 2. Dress code (What are the guidelines for employees?)  |
| 3  |            | 3. Absences and tardiness (What procedures are you to follow and what are the consequences if you fail to do so?) |
| 5  |            | 4. Employee Benefits, Part-time employees (Do you receive discounts, bonuses, vacation time, etc.?)               |
| 5  |            | 5. Employee Benefits, Full-time employees   |
|    |            | 6. Conduct  |
| 2  |            | a. Visits by friends (Are they allowed?)  |
| 2  |            | b. Phone usage (Can you use the phone while at work?)   |
| 2  |            | c. Use of tobacco products (Are you allowed to smoke?)  |
| 2  |            | d. Eating in work area (Are you allowed to eat on the job?)   |
| 2  |            | 7. Employee meetings - Do you have regular meetings? How often?   |
| 2  |            | 8. Shoplifting - What procedures do you follow if you suspect a customer of shoplifting?                          |
|    | <b>II.</b> | <b>Duties and Responsibilities of Your Job</b>  |
| 10 | <b>A.</b>  | List specific duties and responsibilities of your job - be as detailed as possible.                               |
| 2  | <b>B.</b>  | How and when you are evaluated.   |
| 5  | <b>C.</b>  | The importance of your position to the operation of the business - Where do you fit in?                           |
| 5  |            | Correct Format Followed   |
| 5  |            | Spelling/Neatness   |

*The outline may be typed or written neatly in ink.*

**EVALUATION FORM**  
**GRADING PERIOD 1 CONNECTING ACTIVITY #1:**  
**ORIENTATION TO THE WORKPLACE**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

Name \_\_\_\_\_

- The outline may be typed or written **neatly** in ink.
- The outline should be in outline format as shown with sections and each topic clearly labeled.
- Your job outline will be evaluated based on the following criteria:
  - ⇒ Level of Completion
  - ⇒ Neatness

3	_____	Name of business
8	_____	Correct address (including zip code) and phone number
6	_____	Owner or manager's name
8	_____	Immediate supervisor's name
2	_____	Name of your department
6	_____	Organizational chart
2	_____	Business hours of the training station
2	_____	Your work schedule
5	_____	Products and services
3	_____	Breaks
3	_____	Dress code
3	_____	Absences and tardiness
5	_____	Benefits, Part-time employees
5	_____	Benefits, Full-time employees
2	_____	Visits by others
2	_____	Phone usage
2	_____	Use of tobacco products
2	_____	Eating in work area
2	_____	Employee meetings
2	_____	Shoplifting
10	_____	List specific duties and responsibilities of your job
2	_____	How and when you are evaluated
5	_____	The importance of your position to the operation of the business
5	_____	Correct format followed
5	_____	Spelling/Neatness
	_____	TOTAL POINTS EARNED
	_____	LESS: PENALTY FOR LATE WORK (10 points per day)
	_____	FINAL GRADE

**\*\*\*REMINDER\*\*\***

***YOU WILL BE REQUIRED TO COMPLETE AN OUTLINE FOR EACH JOB  
 YOU HAVE DURING THE SCHOOL YEAR!!***

**GRADING PERIOD 1 CONNECTING ACTIVITY #2:  
CAREER DEVELOPMENT  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Career Development connecting activities should be placed behind this page.*

Competency	Assignment
Perform tasks related to leadership and supervision in marketing.	◆ Conduct an interview with the top manager at your training station. Use the interview form provided and complete in your own handwriting.

**GRADING PERIOD 1 CONNECTING ACTIVITY #2:  
CAREER DEVELOPMENT  
North Carolina Marketing Cooperative Education Program  
Due: \_\_\_\_\_**

**INTERVIEW FORM**

Student: \_\_\_\_\_ Date of Interview: \_\_\_\_\_

Person Interviewed: \_\_\_\_\_

Job Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature of Interviewee: \_\_\_\_\_

How long have you worked for this company?

\_\_\_\_\_

How long have you worked in this field?

\_\_\_\_\_

How did you become involved in this field?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are the major tasks involved in your job?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What is the most challenging aspect of your job and why?

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What characteristics are essential for an effective manager or supervisor?

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What methods does your company use to attract part-time employees?

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What methods does your company use to attract full-time employees?

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Who in the company is responsible for interviewing and hiring new employees?

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What training does the company require of new part-time employees?

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What training does the company require of new full-time employees?

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What does your company do to build or maintain high employee morale?

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What trade journals or periodicals are available for managers wishing to stay current on trends or topics in this industry?

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Do you have a copy of one that I could share with my marketing class? \_\_\_\_\_

What professional or trade organizations may someone in this industry join?

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Does this company provide or require any continuing education courses, seminars, workshops, etc. for its full-time employees? If so, what are some examples? \_\_\_\_\_

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Does this company have a published code of ethics? \_\_\_\_\_ Yes \_\_\_\_\_ No

In your opinion, what role do ethics play in the success of this business?

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What important challenges is the company facing now or in the near future?

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Would you be interested in speaking to Marketing classes about careers in your industry? \_\_\_\_\_

Remember to thank the interviewee!

**EVALUATION FORM**  
**GRADING PERIOD 1 CONNECTING ACTIVITY #2: CAREER DEVELOPMENT**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

***INTERVIEW***

Points Possible	Points Earned	Activity
3	_____	Basic Information
3	_____	How long have you worked for this company?
3	_____	How long have you worked in this field?
3	_____	How did you become involved in this field?
6	_____	What are the major tasks involved in your job?
6	_____	What is the most challenging aspect of your job and why?
6	_____	What characteristics are essential for an effective manager or supervisor?
6	_____	What methods does your company use to attract part-time employees?
6	_____	What methods does your company use to attract full-time employees?
6	_____	Who in the company is responsible for interviewing and hiring new employees?
6	_____	What training does the company require of new part-time employees?
6	_____	What training does the company require of new full-time employees?
6	_____	What does your company do to build or maintain high employee morale?
6	_____	What trade journals or periodicals are available for managers in this industry?
6	_____	What professional or trade organizations may someone in this industry join?
6	_____	Does this company provide continuing education? Examples?
2	_____	Does this company have a published code of ethics?
6	_____	In your opinion, what role does ethics play in the success of this business?
6	_____	What important challenges is the company facing now or in the near future?
2	_____	Would you be interested in speaking to Marketing classes about your industry?
100	_____	<b>TOTAL POINTS EARNED</b>
	_____	<b>BONUS: Trade journal or periodical included (5 points)</b>
	_____	<b>LESS: Penalty for late work (10 points per day) Date Submitted _____</b>
	_____	<b>FINAL GRADE</b>

**GRADING PERIOD 2 CONNECTING ACTIVITY #1:  
PRODUCT/SERVICE PLANNING  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Product/Service Planning connecting activities should be placed behind this page.*

Competency	Assignment
Describe the product mix.	<ul style="list-style-type: none"> <li>◆ Determine the number of product lines carried by your training station.</li> <li>◆ Identify five (5) of the product lines carried and analyze the depth of each line.               <ul style="list-style-type: none"> <li>☞ List the products in each line.</li> <li>☞ Explain why the company has chosen this type of product mix.</li> </ul> </li> </ul>
Identify stages of the product life cycle.	<ul style="list-style-type: none"> <li>◆ Identify one (1) product sold by your training station that is in each of the product life cycle stages below.               <ul style="list-style-type: none"> <li>☞ Introductory or growth stage</li> <li>☞ Maturity stage</li> <li>☞ Decline stage</li> </ul> </li> <li>◆ Explain why you classified each product in that stage.</li> </ul>
Analyze marketing strategies for products/services.	<ul style="list-style-type: none"> <li>◆ Choose one competitor with a product mix strategy that differs from that of your training station.</li> <li>◆ Compare your training station with the competitor with regard to:               <ul style="list-style-type: none"> <li>☞ Target market</li> <li>☞ Business image</li> <li>☞ Number of product lines</li> <li>☞ Depth of product lines</li> </ul> </li> <li>◆ Explain how both companies can be successful with similar products and different product strategies.</li> </ul>

**GRADING PERIOD 2 CONNECTING ACTIVITY #1:  
PRODUCT/SERVICE PLANNING  
North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

***DESCRIBE THE PRODUCT MIX***

How many product lines are carried by your training station? 1 – 10 \_\_\_\_ 11 – 30 \_\_\_\_ 31+ \_\_\_\_

Identify five (5) product lines carried by your training station and list the products in each line.

PRODUCT LINE	PRODUCTS IN LINE
1.	
2.	
3.	
4.	
5.	

Why has the company chosen this product mix to offer to its customers? Address the issues of business image and target market. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***IDENTIFY STAGES OF THE PRODUCT LIFE CYCLE***

Product in Introductory or Growth stage: \_\_\_\_\_  
Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Product in Maturity stage: \_\_\_\_\_  
Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Product in Decline stage: \_\_\_\_\_  
Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***ANALYZE MARKETING STRATEGIES FOR PRODUCTS/SERVICES***

Competitor Name: \_\_\_\_\_

Comparisons between competitor and training station with regard to:

Target Market: \_\_\_\_\_

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Business Image: \_\_\_\_\_

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Number of Product Lines: \_\_\_\_\_

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Depth of Product Lines: \_\_\_\_\_

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Explanation of success: \_\_\_\_\_

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**EVALUATION FORM**  
**GRADING PERIOD 2 CONNECTING ACTIVITY #1:**  
**PRODUCT/SERVICE PLANNING**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

Points Possible	Points Earned	Activity
<b><i>DESCRIBE THE PRODUCT MIX</i></b>		
4	_____	Number of product lines carried
10	_____	Five product lines identified
20	_____	Products in each line listed
8	_____	Explanation of product mix
<b><i>IDENTIFY STAGES OF THE PRODUCT LIFE CYCLE</i></b>		
3	_____	Product in introductory or growth stage
6	_____	Explanation of product in introductory or growth stage
3	_____	Product in maturity stage
6	_____	Explanation of product in maturity stage
3	_____	Product in decline stage
6	_____	Explanation of product in decline stage
<b><i>ANALYZE MARKETING STRATEGIES</i></b>		
3	_____	Competitor identified
5	_____	Comparison of target market
5	_____	Comparison of business image
5	_____	Comparison of number of product lines
5	_____	Comparison of depth of product lines
8	_____	Explanation of success
100	_____	<b>TOTAL POINTS EARNED</b>
	_____	<b>LESS: Penalty for late work (10 points per day) Date Submitted _____</b>
	_____	<b>FINAL GRADE</b>

**GRADING PERIOD 2 CONNECTING ACTIVITY #2: MARKETING INFORMATION  
MANAGEMENT**

**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Marketing Information Management connecting activities should be placed behind this page.*

<b>Competency</b>	<b>Assignment</b>
Explain types of information used to make marketing decision.	<ul style="list-style-type: none"><li>◆ Identify the internal records generated by the company that may be used in making marketing decisions.</li><li>◆ Identify the person in your company responsible for managing the information for making decisions.</li></ul>
Explain and conduct marketing research.	<ul style="list-style-type: none"><li>◆ Develop a research plan which addresses an issue, problem, or potential improvement at your training station.</li><li>◆ Present your plan to your manager for feedback on the appropriate form.</li></ul>

**GRADING PERIOD 2 CONNECTING ACTIVITY #2:  
MARKETING INFORMATION MANAGEMENT  
North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

***TYPES OF INFORMATION***

Identify the internal records generated by your company that may be used in making marketing decisions. \_\_\_\_\_

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Who in your company is responsible for managing the information obtained and for making marketing decisions?

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Give some examples of how the company uses the data gathered through its marketing information system. \_\_\_\_\_

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## Sources of Research Information

List appropriate primary sources of information [2 points]

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List appropriate secondary/internal sources of information [2 points]

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## Plan for Gathering Information

Method(s) for gathering information from primary sources [3 points]

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Method(s) for gathering information from secondary sources [3 points]

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Questions, research instrument, or questionnaire to be used in gathering information (attach to this form) [35 points total]

- Sufficient number of questions [5 points]
- Relevant questions [5 points]
- Questions specific and not open to various interpretations [5 points]
- Questions not leading or biased [5 points]
- Questions in logical order [5 points]
- Correct grammar/spelling [5 points]
- Appropriate demographic information requested [5 points]



**EMPLOYER FEEDBACK FORM**

**GRADING PERIOD 2 CONNECTING ACTIVITY #2:  
MARKETING INFORMATION MANAGEMENT  
North Carolina Marketing Cooperative Education Program**

PLEASE EVALUATE YOUR EMPLOYEE'S RESEARCH PLAN USING THE SCALE BELOW.

<b>ITEM</b>	<b>RATING</b>			
<input checked="" type="checkbox"/> The issue or topic chosen is relevant for the business	Excellent	Good	Fair	Poor
<input checked="" type="checkbox"/> The research plan is workable in the business	Excellent	Good	Fair	Poor

**Please evaluate the questions asked**

<input checked="" type="checkbox"/> Questions are relevant to the topic and business	Excellent	Good	Fair	Poor
<input checked="" type="checkbox"/> Questions are specific and not open to interpretation	Excellent	Good	Fair	Poor
<input checked="" type="checkbox"/> Questions are in a logical order	Excellent	Good	Fair	Poor
<input checked="" type="checkbox"/> Appropriate demographic information is requested	Excellent	Good	Fair	Poor

**Please make comments below. Thank you for your time!**

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**Name** \_\_\_\_\_  
Please Print

**Signature** \_\_\_\_\_

**Title** \_\_\_\_\_

**Date** \_\_\_\_\_

**EVALUATION FORM**  
**GRADING PERIOD 2 CONNECTING ACTIVITY #2:**  
**MARKETING INFORMATION MANAGEMENT**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

***TYPES OF INFORMATION USED TO MAKE MARKETING DECISIONS***

Points Possible	Points Earned	Activity	<b><u>TOTAL</u></b>
5	_____	Identify internal records used	
5	_____	Identify person responsible for managing information	_____

***MARKETING RESEARCH PLAN***

ACTIVITY	POINT VALUE	POINTS EARNED	COMMENTS
Name of Business	2		
Description of Business	3		
Description of Research Topic	5		
Primary Sources Described	2		
Secondary Sources Described	2		
Method(s) of Gathering Information from Primary Sources	3		
Method(s) of Gathering Information from Secondary Sources	3		
Questions for Survey	(35)		
• Sufficient # of Questions	5		
• Relevant Questions	5		
• Specific & Not Open to Interpretation	5		
• Questions Not Leading or Biased	5		
• Questions in Logical Order	5		
• Correct Grammar/Spelling	5		
• Appropriate Demographic Information	5		
Plan for Gathering Information	10		
Plan for Reporting Information	10		
Employer Feedback Form	15		
<b>TOTAL POINTS EARNED</b>	90		

**TOTAL POINTS EARNED** \_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

**FINAL GRADE** \_\_\_\_\_

**GRADING PERIOD 3 CONNECTING ACTIVITY #1:  
PRICING  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Pricing connecting activities should be placed behind this page.*

Competency	Assignment
Analyze company pricing policies and pricing strategies.	<ul style="list-style-type: none"> <li>◆ Identify which of the following pricing techniques are used at your training station and give examples.               <ul style="list-style-type: none"> <li>☞ Promotional Pricing</li> <li>☞ Prestige Pricing</li> <li>☞ Odd/Even Pricing</li> <li>☞ Price Lining</li> <li>☞ Loss Leaders</li> </ul> </li> <li>◆ Explain why your company's pricing is consistent with its target market and business image.</li> <li>◆ Choose three (3) products/services offered by your company.               <ul style="list-style-type: none"> <li>☞ Record the price of each product/service.</li> <li>☞ Visit another location owned by your company and record the price of the three products at that location. (If another location is not available, then visit a competitor in its place.)</li> <li>☞ Visit a competitor that offers the same three products/services and record their prices.</li> </ul> </li> <li>◆ Analyze the reasons for the price similarities and/or differences.</li> </ul>

**GRADING PERIOD 3 CONNECTING ACTIVITY #1:  
PRICING  
North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

***PRICING TECHNIQUES***

<b>TECHNIQUE</b>	<b>YES</b>	<b>NO</b>	<b>EXAMPLES</b>
<b>Promotional Pricing</b>			
<b>Prestige Pricing</b>			
<b>Odd/Even Pricing</b>			
<b>Price Lining</b>			
<b>Loss Leaders</b>			

Explain why your company's pricing is consistent with its target market and business image. \_\_\_\_\_

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**EVALUATION FORM**  
**GRADING PERIOD 3 CONNECTING ACTIVITY #1:**  
**PRICING**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

***PRICING TECHNIQUES***

Technique	Points Possible	Points Earned	<b>TOTAL</b>
Promotional Pricing	6	_____	
Prestige Pricing	6	_____	
Odd/Even Pricing	6	_____	
Price Lining	6	_____	
Loss Leaders	6	_____	

Points Possible	Points Earned	Activity	<b>TOTAL</b>
15	_____	Explanation of consistency	_____

***PRICE COMPARISON and ANALYSIS***

Product #	Company #1 Price		Company #2 Price		Company #3 Price		<b>TOTAL</b>
	Points Possible	Points Earned	Points Possible	Points Earned	Points Possible	Points Earned	
1	3	_____	3	_____	3	_____	
2	3	_____	3	_____	3	_____	
3	3	_____	3	_____	3	_____	

Points Possible	Points Earned	Activity	<b>TOTAL</b>
28	_____	Analysis of reasons for similarities/differences	_____

100 **TOTAL POINTS EARNED** \_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

**FINAL GRADE** \_\_\_\_\_

**GRADING PERIOD 3 CONNECTING ACTIVITY #2: PROMOTION**  
**North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Promotion connecting activities should be placed behind this page.*

Competency	Assignment
Develop a promotional plan.	<ul style="list-style-type: none"> <li>◆ Interview your manager about your company's current promotion activities. Use the Promotion Interview form.</li> <li>◆ Develop a two-week promotion plan for an upcoming event at your training station.</li> </ul>
Compare cost of various promotional media.	<ul style="list-style-type: none"> <li>◆ Calculate the cost of your two-week promotion plan.</li> <li>◆ List sources, date obtained, and contact's name and phone number.</li> </ul>

*You must obtain your supervisor's signature on this assignment.*

**GRADING PERIOD 3 CONNECTING ACTIVITY #2:  
PROMOTION  
North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

**PROMOTION ACTIVITIES INTERVIEW FORM**

Person Interviewed: \_\_\_\_\_

Title: \_\_\_\_\_

Signature of Interviewee: \_\_\_\_\_

Date of Interview: \_\_\_\_\_

Which of the following promotional tools does the company use?

Promotional Tool	Yes	No	Explanations and Examples
Brochures			
Contests			
Coupons			
Direct Mail			
Flyers			
Internet			
Magazines			
Newspapers			
Outdoor			
Public Relations			
Radio			
Specialty Advertising			
Telemarketing			
Television			
Transit			
Yellow Pages			
Other (specify)			
Other (specify)			











**EVALUATION FORM**  
**GRADING PERIOD 3 CONNECTING ACTIVITY #2: PROMOTION**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

**PROMOTION ACTIVITIES INTERVIEW**

*Use of promotional tools – 1 point each, 17 points possible*

**TOTAL**

Promotional Tool	Points Earned	Promotional Tool	Points Earned	Promotional Tool	Points Earned
Brochure		Magazines		Telemarketing	
Contests		Newspapers		Television	
Coupons		Outdoor		Transit	
Direct Mail		Public Relations		Yellow Pages	
Flyers		Radio		Other	
Internet		Specialty Advertising			

Points Possible	Points Earned	Question
3	_____	Which activities are most effective and why?
2	_____	Who is responsible for planning and coordinating promotions?
2	_____	Who develops company's promotional tools?
3	_____	What does the company promote on a regular basis?
3	_____	How does the company evaluate effectiveness of promotions?

**PROMOTION PLAN**

Points Possible	Points Earned	Section of Plan	Points Possible	Points Earned	Section of Plan
5	_____	Description of business	6	_____	Display
8	_____	Objectives of campaign	4	_____	Publicity
6	_____	Special events	5	_____	Responsibilities
6	_____	Advertising	10	_____	Benefits

**COMPARE COSTS OF VARIOUS PROMOTIONAL MEDIA**

Points Possible	Points Earned	Section of Plan	Points Possible	Points Earned	Section of Plan
4	_____	All activities from plan are listed	4	_____	Sources identified
4	_____	Costs are calculated	4	_____	Date, name, phone number listed
4	_____	Costs are accurate			

**TOTAL POINTS EARNED** \_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

**FINAL GRADE** \_\_\_\_\_

**GRADING PERIOD 4 CONNECTING ACTIVITY #1:  
PURCHASING  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Purchasing connecting activities should be placed behind this page.*

Competency	Assignment
<p>Explain company purchasing policies and procedures.</p>	<ul style="list-style-type: none"> <li>◆ Identify title of person(s) responsible for making the purchasing decisions for your company.</li> <li>◆ List 2 products that are considered a:               <ul style="list-style-type: none"> <li>☞ New-task purchase (within the past 6 months)</li> <li>☞ Modified rebuy purchase</li> <li>☞ Straight rebuy purchase</li> </ul> </li> <li>◆ Identify two (2) items which would be found on each of the following basic buying plans:               <ul style="list-style-type: none"> <li>☞ Basic stock list</li> <li>☞ Model stock list</li> <li>☞ Never out stock list</li> </ul> </li> <li>◆ Determine if stock turnover is calculated in your company.               <ul style="list-style-type: none"> <li>☞ If yes, explain how the information is used in making purchasing and marketing decisions.</li> <li>☞ If no, explain why not.</li> </ul> </li> <li>☺ EXTRA CREDIT: Bring in a copy of the following forms used in your company:               <ul style="list-style-type: none"> <li>☞ Purchase order</li> <li>☞ Invoice</li> <li>☞ Packing slip</li> <li>☞ Apron</li> <li>☞ Basic stock list</li> <li>☞ Model stock list</li> <li>☞ Never out stock list</li> </ul> </li> </ul>
<p>Explain merchandising-related discounts.</p>	<ul style="list-style-type: none"> <li>◆ List the invoice (dating) terms that are commonly used in your company.</li> </ul>

**GRADING PERIOD 4 CONNECTING ACTIVITY #1:  
PURCHASING  
North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

***COMPANY PURCHASING POLICIES & PROCEDURES***

Identify the title of person(s) responsible for making the purchasing decisions for your company.

\_\_\_\_\_

\_\_\_\_\_

List 2 products that are considered a:

New-task purchase (within last 6 months)

1. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Modified rebuy purchase

1. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Straight rebuy purchase

1. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Identify 2 items that would be found on each of the following basic buying plans and explain why the product is on that type of plan.

Basic stock list

1. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Model stock list

1. Product: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Product: \_\_\_\_\_  
Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Never out stock list

1. Product: \_\_\_\_\_  
Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Product: \_\_\_\_\_  
Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is stock turnover calculated in your company?      \_\_\_\_\_ Yes      \_\_\_\_\_ No

Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***MERCHANDISING-RELATED DISCOUNTS***

List the invoice (dating) terms that are commonly used in your company.

_____	_____	_____
_____	_____	_____

☺ REMEMBER YOUR EXTRA CREDIT OPPORTUNITY!! Bring in a copy of the following forms used in your company:

- |                      |                            |
|----------------------|----------------------------|
| _____ Purchase Order | _____ Basic Stock List     |
| _____ Invoice        | _____ Model Stock List     |
| _____ Packing Slip   | _____ Never Out Stock List |
| _____ Apron          |                            |

**EVALUATION FORM**  
**GRADING PERIOD 4 CONNECTING ACTIVITY #1: PURCHASING**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

***PURCHASING POLICIES & PROCEDURES***

Points Possible	Points Earned	Activity	<b>TOTAL</b>
5	_____	Person responsible for purchasing decisions	_____

***TYPES OF PURCHASE SITUATIONS***

Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity
2	_____	New-task product #1	4	_____	Explanation
2	_____	New-task product #2	4	_____	Explanation
2	_____	Modified rebuy product #1	4	_____	Explanation
2	_____	Modified rebuy product #2	4	_____	Explanation
2	_____	Straight rebuy product #1	4	_____	Explanation
2	_____	Straight rebuy product #2	4	_____	Explanation

***BASIC BUYING PLANS***

Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity
2	_____	Basic stock list product #1	4	_____	Explanation
2	_____	Basic stock list product #2	4	_____	Explanation
2	_____	Model stock list product #1	4	_____	Explanation
2	_____	Model stock list product #2	4	_____	Explanation
2	_____	Never out stock list product #1	4	_____	Explanation
2	_____	Never out stock list product #2	4	_____	Explanation

Points Possible	Points Earned	Activity
15	_____	Explain whether or not stock turnover is used and why
8	_____	List dating terms used in your company

**TOTAL POINTS EARNED** \_\_\_\_\_

**EXTRA CREDIT (2 points each, maximum of 14 points)** \_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

**FINAL GRADE** \_\_\_\_\_

**GRADING PERIOD 4 CONNECTING ACTIVITY #2:  
FINANCIAL MANAGEMENT  
North Carolina Marketing Cooperative Education Program**

Due Date: \_\_\_\_\_

*All Financial Management connecting activities should be placed behind this page.*

Competency	Assignment
<p>Explain the function of financing in marketing.</p>	<ul style="list-style-type: none"> <li>◆ Determine three (3) budgets that are utilized in your training station.               <ul style="list-style-type: none"> <li>☞ State the title of the person(s) responsible for determining the budget.</li> <li>☞ State the title of the person(s) responsible for managing the budget.</li> <li>☞ For each budget listed, explain how a budget cut would impact the operation of the business. Be specific and give examples.</li> </ul> </li> <li>◆ List 10 variable operating expenses used in your training station.</li> <li>◆ List 4 fixed operating expenses used in your training station.</li> <li>◆ Determine, on average, what percentage of gross sales are the company's returns and allowances.</li> <li>◆ List the taxes that the company is responsible for paying.</li>   <li>☺ EXTRA CREDIT: Bring in a copy of the company's annual report and list the financial statements contained in the report.</li> </ul>

**GRADING PERIOD 4 CONNECTING ACTIVITY #2:  
FINANCIAL MANAGEMENT  
North Carolina Marketing Cooperative Education Program**

Name: \_\_\_\_\_

Training Station: \_\_\_\_\_

Course: \_\_\_\_\_

Due Date: \_\_\_\_\_

TYPE OF BUDGET	TITLE OF PERSON(S) RESPONSIBLE FOR DETERMINING BUDGET	TITLE OF PERSON(S) RESPONSIBLE FOR MANAGING BUDGET
1.		
2.		
3.		

Impact of budget cut on company.

BUDGET #1 \_\_\_\_\_

IMPACT \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

BUDGET #2 \_\_\_\_\_

IMPACT \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

BUDGET #3 \_\_\_\_\_

IMPACT \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List 10 variable operating expenses in your training station.

- |          |           |
|----------|-----------|
| 1. _____ | 6. _____  |
| 2. _____ | 7. _____  |
| 3. _____ | 8. _____  |
| 4. _____ | 9. _____  |
| 5. _____ | 10. _____ |

List 4 fixed operating expenses in your training station.

- |          |          |
|----------|----------|
| 1. _____ | 3. _____ |
| 2. _____ | 4. _____ |

What percentage of gross sales are returns and allowances? \_\_\_\_\_

List the taxes that your company is responsible for paying. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

☺ EXTRA CREDIT: Attach a copy of your company's annual report.

Which financial statements are contained in this report?

\_\_\_\_\_  
\_\_\_\_\_

**EVALUATION FORM**  
**GRADING PERIOD 4 CONNECTING ACTIVITY #2:**  
**FINANCIAL MANAGEMENT**  
**North Carolina Marketing Cooperative Education Program**  
**Due: \_\_\_\_\_**

NAME \_\_\_\_\_

Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity	Points Possible	Points Earned	Activity	TOTAL
3	_____	Budget #1	3	_____	Determining	3	_____	Managing	
3	_____	Budget #2	3	_____	Determining	3	_____	Managing	
3	_____	Budget #3	3	_____	Determining	3	_____	Managing	_____

*Impact of budget cuts on business operations*

Points Possible	Points Earned	Activity	
10	_____	Budget #1	
10	_____	Budget #2	
10	_____	Budget #3	_____

Points Possible	Points Earned	Activity	
20	_____	Variable Expenses (2 points each)	
8	_____	Fixed Expenses (2 points each)	
7	_____	Returns and allowances percentage	
8	_____	Taxes paid by company	_____

**TOTAL POINTS EARNED** \_\_\_\_\_

**EXTRA CREDIT (Annual report – 4 points, List – 4 points)** \_\_\_\_\_

**LESS: Penalty for late work (10 points per day) Date Submitted** \_\_\_\_\_

**FINAL GRADE** \_\_\_\_\_

## RESOURCES

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Kotler, Philip and Armstrong, Gary, Marketing: An Introduction, Prentice Hall, Inc., Upper Saddle River, NJ, 1997.

Meyer, Earl C. and Allen, Kathleen R., Entrepreneurship and Small Business Management, Glencoe/McGraw-Hill Publishing Company, Lake Forest, IL.. 1994.