

STUDENT NAME(S)

Task	Observations Of Student
Planning and Presentation	4 3 2 1 0 N/A
Quality Management	4 3 2 1 0 N/A
Role of Managers	4 3 2 1 0 N/A
Management Analysis	4 3 2 1 0 N/A
Critical Review	4 3 2 1 0 N/A
Presenting/Reporting	4 3 2 1 0 N/A

STANDARD IS 2 IN EACH APPLICABLE TASK

Rating Scale

The student:

4	Exceeds defined outcomes. Plans and solves problems critically and creatively in a self-direct manner. Selects and uses tools, materials and/or processes efficiently, effectively and with confidence.
3	Meets defined outcomes. Plans and solves problems in a self-direct manner. Selects and uses tools, materials and/or processes efficiently and effectively.
2	Meets defined outcomes. Plans and solves problems with limited assistance. Selects and uses tools, materials and/or processes appropriately.
1	Meets defined outcomes. Follows a guided plan of action. Uses tools, materials and/or processes appropriately.
0	Has not yet completed defined outcomes. Tools, materials and/or processes are used inappropriately.

TASK CHECKLIST - criteria for intermediate level

The student:

Preparation and Planning

- sets goals and describes steps to achieve them
- uses personal initiative to formulate questions and find answers
- accesses a range of relevant in-school/community resources
- interprets, organizes and combines information into a logical sequence
- records information accurately with appropriate supporting detail and using correct technical terms
- plans and uses time effectively
- gathers and responds to feedback regarding approach to task and project status

QUALITY MANAGEMENT PRESENTATION

Content:

- describes the role of customers, employees and managers in developing systems and strategies for improved quality
- explores the role of teams and collaboration in the development of improved quality
- explains who makes the decisions regarding changes in an organization focusing on improved quality

THE ROLE OF MANAGERS

Content:

- identifies four case studies from a variety of sources (e.g., television, videos, magazines, journal articles, newspaper clippings or books)
- analyzes each of the cases by including:
 - a short overview of the organization and its management structure
 - a description of how managers encourage (or do not encourage) improvement in the organization through strategies used during the planning, organizing, leading, implementation and monitoring stages
 - your personal impressions on the strategies used
 - suggestions of strategies you would use if managing the organization

MANAGEMENT ANALYSIS REPORT

Content:

- identifies an area that needs improvement
- defines the problem
- describes the goals and gives a rationale for changing the system (outline the current system and strategies being used and how you intend to improve it)
- outlines a plan for implementation
- implements the plan
- monitors the change
- evaluates the plan and reports on the oversuccess or drawbacks of the action taken
- makes adjustments as required

CRITICAL REVIEW

Content:

- summarizes a current management system in regards to:
 - overview
 - strategies & use
 - pros & cons
 - personal views

Presenting/Reporting

- demonstrates effective use of at least two communication media:
 - e.g., Written: spelling, punctuation, grammar, format (formal/informal)*
 - Oral: voice projection, body language, appearance*
 - Visual: techniques, tools, clarity*
- maintains acceptable grammatical and technical standards through proofreading and editing
- provides an introduction that describes the purpose and scope of the project
- communicates ideas into a logical sequence with sufficient supporting detail
- states a conclusion by synthesizing the information gathered
- provides a reference list that includes five or more relevant information sources

Student Name(s) _____

Standard: collects and evaluates a minimum of three print advertisements, complete all sections below.

Print Ad 1

Print Ad 2

Print Ad 3

Name magazine, newspaper, etc.
Identify target market.
State the objective of the advertisement.
Comment on use of AIDA concept.
Identify elements presented in the advertisement. <input type="checkbox"/> headline <input type="checkbox"/> dominate feature <input type="checkbox"/> copy <input type="checkbox"/> related items (suggested selling) <input type="checkbox"/> price <input type="checkbox"/> logo (signature cut) <input type="checkbox"/> other information (e.g., address, phone, hours) <input type="checkbox"/> border <input type="checkbox"/> limited number of fonts <input type="checkbox"/> effective use of white space
Comment on the overall presentation of ad.

Name magazine, newspaper, etc.
Identify target market.
State the objective of the advertisement.
Comment on use of AIDA concept.
Identify elements presented in the advertisement. <input type="checkbox"/> headline <input type="checkbox"/> dominate feature <input type="checkbox"/> copy <input type="checkbox"/> related items (suggested selling) <input type="checkbox"/> price <input type="checkbox"/> logo (signature cut) <input type="checkbox"/> other information (e.g., address, phone, hours) <input type="checkbox"/> border <input type="checkbox"/> limited number of fonts <input type="checkbox"/> effective use of white space
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Name magazine, newspaper, etc.
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Identify elements presented in the advertisement. <input type="checkbox"/> headline <input type="checkbox"/> dominate feature <input type="checkbox"/> copy <input type="checkbox"/> related items (suggested selling) <input type="checkbox"/> price <input type="checkbox"/> logo (signature cut) <input type="checkbox"/> other information (e.g., address, phone, hours) <input type="checkbox"/> border <input type="checkbox"/> limited number of fonts <input type="checkbox"/> effective use of white space
Comments on the overall presentation of ad.

[The 1997 text was deleted September 1999.]

STUDENT: _____

NAME OF PRODUCT: _____

Observations of Student	CRITERIA
	<i>The student:</i>
4 3 2 1 0	<p><u>Creativity and neatness</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> all parts of the ad are attractive <input type="checkbox"/> the ad has a clean, uncluttered look <input type="checkbox"/> idea is original, unique and clever
4 3 2 1 0	<p><u>Layout</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> typefaces (fonts) selected are appropriate for the product or store <input type="checkbox"/> white space used properly to enhance the overall appearance of the advertisement <input type="checkbox"/> the ad has a focal point (a place for the eye to begin) <input type="checkbox"/> the ad flows (positioning each element in a logical place, moving the reader's eye from one element to the other) <input type="checkbox"/> all parts of the advertisement tie together and relate to the objective of the advertisement
4 3 2 1 0	<p><u>Parts of an advertisement</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> attention-getting <i>headline</i> <input type="checkbox"/> dominant <i>illustration</i> that enables reader to tell at a glance what the ad is about <input type="checkbox"/> <i>copy</i> relates product features and turns them into customer benefits <input type="checkbox"/> recognizable <i>logo</i> is present
4 3 2 1 0	<p><u>Selling Power</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> overall impact of ad induces the reader into action <input type="checkbox"/> other information pertinent to the reader is given; e.g., store hours, address, phone number <input type="checkbox"/> action words are used to bring the customer into the store; e.g., limited offer/quantities
4 3 2 1 0	<p><u>Oral Presentation</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> explains how the objective was achieved and the section of the newspaper the ad would best be placed <input type="checkbox"/> describes how the AIDA concept was used in developing the advertisement

STANDARD IS 2 IN EACH APPLICABLE TASK

Rating Scale

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<p>REFLECTIONS/COMMENTS</p>

[The 1997 text was deleted September 1999.]

Note

*Effective September 1999,
pages G.31 to G.32 have been deleted
and not replaced.*

Student Name(s) _____

Types of Displays	
<input type="checkbox"/>	presents and describes the following types of exterior displays: <input type="checkbox"/> open <input type="checkbox"/> closed <input type="checkbox"/> partially closed
<input type="checkbox"/>	presents and describes the following types of interior displays: <input type="checkbox"/> display racks <input type="checkbox"/> gondola display <input type="checkbox"/> table display <input type="checkbox"/> dump display <input type="checkbox"/> package display <input type="checkbox"/> platform display <input type="checkbox"/> architectural display <input type="checkbox"/> showcase display

Elements of Design in VM	
<input type="checkbox"/>	demonstrates the atmosphere the following lines create in visual merchandising: <input type="checkbox"/> vertical <input type="checkbox"/> horizontal <input type="checkbox"/> curved <input type="checkbox"/> diagonal
<input type="checkbox"/>	presents examples of the following shapes and how they are used in visual merchandising: <input type="checkbox"/> geometric <input type="checkbox"/> organic <input type="checkbox"/> positive <input type="checkbox"/> negative
<input type="checkbox"/>	demonstrates knowledge and use of: <input type="checkbox"/> colour wheel <input type="checkbox"/> different moods colours create <input type="checkbox"/> monochromatic colour schemes <input type="checkbox"/> analogous colour schemes <input type="checkbox"/> triadic colour schemes <input type="checkbox"/> complimentary colour schemes

<input type="checkbox"/>	demonstrates the atmosphere created through the use of five different textures: <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____
<input type="checkbox"/>	demonstrate knowledge and use of weight and size in visual merchandising: <input type="checkbox"/> big vs. small <input type="checkbox"/> light vs. dark <input type="checkbox"/> oversized <input type="checkbox"/> foreground vs. background

Principles of Design in VM	
<input type="checkbox"/>	demonstrates and explains when to use each the following visual merchandising arrangements: <input type="checkbox"/> interface <input type="checkbox"/> stair-step <input type="checkbox"/> pyramid <input type="checkbox"/> zigzag <input type="checkbox"/> repetition <input type="checkbox"/> radiation
<input type="checkbox"/>	demonstrates and explains the use of the following design principles in visual merchandising: <input type="checkbox"/> harmony <input type="checkbox"/> contrast <input type="checkbox"/> rhythm <input type="checkbox"/> proportion <input type="checkbox"/> emphasis <input type="checkbox"/> unity
<input type="checkbox"/>	demonstrates and explains the following types of balance: <input type="checkbox"/> formal <input type="checkbox"/> informal

<input type="checkbox"/>	demonstrates and explains the following types of lighting: <input type="checkbox"/> direct <input type="checkbox"/> indirect
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STANDARD IS 2 IN EACH APPLICABLE TASK AREA

Rating Scale

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REFLECTIONS/COMMENTS

Standard: Prepare a visual merchandising plan for a calendar year for a particular business (**minimum of eight display ideas for the year**). Ideas should include type of display, theme, merchandise, props, supplies needed and a sketch showing the merchandise and elements and principles of design being applied. This task will be used for future display ideas.

Description of Display	
<input type="checkbox"/>	Month/season and event being promoted
<input type="checkbox"/>	Type of display, display theme or idea
<input type="checkbox"/>	Merchandise to use
<input type="checkbox"/>	Props and supplies necessary to complete display

<input type="checkbox"/>	Colour/Colour Scheme
<input type="checkbox"/>	Display arrangement and principles used.

Make a sketch of your display below

STANDARD IS 2 IN EACH APPLICABLE TASK AREA

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STUDENT: _____

THEME OF VISUAL MERCHANDISING PRESENTATION: _____

STANDARD IS 2 IN EACH APPLICABLE TASK

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REFLECTIONS/COMMENTS

Observations of Student	CRITERIA
<i>The student:</i>	
4 3 2 1 0	<p><u>Power to Attract Attention</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> dominant feature attracts attention <input type="checkbox"/> appropriate background used <input type="checkbox"/> colour, lighting and props enhance theme and merchandise <input type="checkbox"/> idea is original, unique and clever
4 3 2 1 0	<p><u>Arrangement</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> proper amounts of merchandise used <input type="checkbox"/> all elements are in proportion <input type="checkbox"/> use of line and design principles leads eye to focal point <input type="checkbox"/> specific arrangement of goods is evident <input type="checkbox"/> display is in balance (formal or informal)
4 3 2 1 0	<p><u>Selling Power</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> display creates interest and desire for the merchandise <input type="checkbox"/> customer can find and concentrate on most important item(s) being sold <input type="checkbox"/> related merchandise is presented <input type="checkbox"/> all parts of the display create unity
4 3 2 1 0	<p><u>Technical Excellence and Cleanliness</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> supplies are used effectively to display merchandise <input type="checkbox"/> all props (forms and fixtures) are clean and in good repair <input type="checkbox"/> background, ceiling, floor and glass is clean and neat <input type="checkbox"/> show card is professional looking

Student Name(s) _____

Standard: minimum of three observations, all sections completed

General Appearance
<input type="checkbox"/> Name of store and location.
<input type="checkbox"/> What event is being presented? What is the theme?
<input type="checkbox"/> What merchandise is being presented? (items for sale)
<input type="checkbox"/> What props have been used? Remember these enhance the theme and merchandise.
<input type="checkbox"/> What supplies were necessary to complete this presentation? (little things—fish wire, staple gun, etc.)

Elements and Principles of Design
<input type="checkbox"/> Does the presentation use formal or informal balance? Justify your observation.
<input type="checkbox"/> Describe how the display does or does not create unity.
<input type="checkbox"/> What colours and colour schemes have been used?
<input type="checkbox"/> Has a specific display arrangement or combination of arrangements been used. Explain.

<input type="checkbox"/> Does the display have lights? If yes, describe them.
<input type="checkbox"/> What are some of the other elements and principles of design used in the creation of this display?

Overall Impression					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Poor	0	1	2	3	4 Excellent
Student Reflections regarding overall impression					

Student(s) _____

Task	Observations of Student
Preparation and Planning	4 3 2 1 0 N/A
Information Gathering and Processing	4 3 2 1 0 N/A
Content	4 3 2 1 0 N/A
Collaboration and Teamwork	4 3 2 1 0 N/A
Information Sharing	4 3 2 1 0 N/A

STANDARD IS 2 IN EACH APPLICABLE TASK

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TASK CHECKLIST

The student:

- Preparation and Planning**
 - sets goals and establishes steps to achieve them
 - creates and adheres to useful timelines
 - uses personal initiative to formulate questions and find answers
 - plans and uses time effectively
- Information Gathering and Processing**
 - accesses a range of relevant in-school/community resources
 - uses a range of information-gathering techniques
 - interprets, organizes and combines information into a logical sequence
 - records information accurately with appropriate supporting detail and using correct technical terms
 - determines accuracy/currency/reliability of information sources
 - gathers and responds to feedback regarding approach to the task

Content

- researches and reports on a particular store's policies and procedures including:
 - sales and service policies
 - credit and collection
 - store security
 - human resources
 - recordkeeping
- Collaboration and Teamwork**
 - cooperates with group members
 - shares work appropriately among group members
 - negotiates solutions to problems
- Information Sharing**
 - demonstrates effective use of two or more communication media:
e.g., written, oral, audio-visual
 - communicates ideas in a logical sequence with sufficient supporting detail
 - maintains acceptable grammatical and technical standards
 - cites five or more relevant information sources

REFLECTIONS/COMMENTS

STUDENT: _____

TRAINING SITE: _____

STANDARD IS 2 IN EACH APPLICABLE TASK

Rating Scale

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Observations of Student	CRITERIA
4 3 2 1 0	<p><u>Preparation and Planning</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> prepares self for task <input type="checkbox"/> organizes and works in orderly manner <input type="checkbox"/> interprets and carries out instructions accurately <input type="checkbox"/> demonstrates proper office etiquette <input type="checkbox"/> plans and uses time effectively <input type="checkbox"/> adheres to routine procedure <input type="checkbox"/> res
4 3 2 1 0	<p><u>Buys Goods and Services</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> identifies and classifies (convenience, shopping, staple, etc.) potential products and services to purchase <input type="checkbox"/> determines their stages in the produce/fashion cycle <input type="checkbox"/> evaluates a minimum of two suppliers (vendors) for quality, quantity, price and delivery for a variety of merchandise <input type="checkbox"/> quotes prices from two or more suppliers (vendors) for a variety of merchandise <input type="checkbox"/> selects merchandise to order <input type="checkbox"/> prepares purchase orders <input type="checkbox"/> maintains adequate stock <input type="checkbox"/> explain shipping terms available to purchaser; e.g., FOB factory, destination
4 3 2 1 0	<p><u>Receives Goods and Services</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> describes receiving dock procedures <input type="checkbox"/> recommends the type of check to use for a variety of merchandise; e.g., direct, blind, spot, quality <input type="checkbox"/> recommends policy and procedures for damaged goods or short shipments
4 3 2 1 0	<p><u>Pays for Goods and Services</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> verifies accuracy of invoices <input type="checkbox"/> calculates due dates of invoices <input type="checkbox"/> calculates trade or cash discounts and net amount of invoices <input type="checkbox"/> records payment of invoice in journal <input type="checkbox"/> pays invoice by cheque
4 3 2 1 0	<p><u>Works Collaboratively</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> cooperate with group members <input type="checkbox"/> share work appropriately with group members <input type="checkbox"/> negotiate solutions to problems

REFLECTIONS/COMMENTS

STUDENT: _____

TRAINING SITE: _____

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Observations of Student	CRITERIA
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4 3 2 1 0	<p><u>Prices, Goods and Services</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> determines the best marking procedures to use for a variety of merchandise <input type="checkbox"/> calculates markups based on cost and retail <input type="checkbox"/> determines why and when to markdown goods <input type="checkbox"/> calculates markdowns <input type="checkbox"/> calculates break-even points <input type="checkbox"/> creates appropriate price tags for merchandise <input type="checkbox"/> evaluates the effects of policies
4 3 2 1 0	<p><u>Controls Goods and Services</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> evaluates and recommends methods of inventory control for a variety of merchandise (fifo, lifo, perpetual, importance of stock rotation) <input type="checkbox"/> takes a stock count of goods <input type="checkbox"/> prepares and calculates an inventory list <input type="checkbox"/> calculates stock turnover and explain its purpose <input type="checkbox"/> relates alternative methods of stocking goods (on and off selling floor) <input type="checkbox"/> recommends procedures to improve an inventory system
4 3 2 1 0	<p><u>Works Collaboratively</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> cooperates with group members <input type="checkbox"/> shares work appropriately with group members <input type="checkbox"/> negotiates solutions to problems

REFLECTIONS/COMMENTS

Student(s) _____

Task	Observations of Student
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Information Gathering and Processing	4 3 2 1 0 N/A
Content	4 3 2 1 0 N/A
Collaboration and Teamwork	4 3 2 1 0 N/A
Information Sharing	4 3 2 1 0 N/A

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TASK CHECKLIST

The student:

Preparation and Planning

- sets goals and establishes steps to achieve them
- creates and adheres to useful timelines
- uses personal initiative to formulate questions and find answers
- plans and uses time effectively

Information Gathering and Processing

- accesses a range of relevant in-school/community resources
- uses a range of information-gathering techniques
- interprets, organizes and combines information into a logical sequence
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Content – describes and analyzes a selected office including:

- name of environment and type of business
- flowchart of organization
- explanation (rationale) for how office is physically organized

Content (continued)

- explains how tasks are defined for employees (e.g., job descriptions, individual vs. work teams).
- explains how management supports or does not support a commitment to continuous improvement through:
 - customer satisfaction
 - leadership
 - employee relations/training
 - teamwork (give details to support findings)
- identifies and assesses the equipment used in the office. (questions to consider: what equipment is available, who has access to the equipment, what are the safety and security concerns)

Collaboration and Teamwork

- cooperates with group members
- shares work appropriately among group members
- negotiates solutions to problems

Information Sharing

- demonstrates effective use of two or more communication media: *e.g., written, oral, audio-visual*
- communicates ideas in a logical sequence with sufficient supporting detail
- maintains acceptable grammatical and technical standards
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Observations of Student	CRITERIA
	<i>The student:</i>
4 3 2 1 0	<p><u>Preparation and Planning</u></p> <p><input type="checkbox"/> prepares self for task</p> <p><input type="checkbox"/> organizes and works in orderly manner</p> <p><input type="checkbox"/> interprets and carries out instructions accurately</p> <p><input type="checkbox"/> demonstrates proper office etiquette</p> <p><input type="checkbox"/> plans and uses time effectively</p> <p><input type="checkbox"/> adheres to routine procedures</p>
4 3 2 1 0	<p><u>Uses Equipment and Materials</u> - list type and model of each piece of equipment below.</p> <p><input type="checkbox"/> chooses and uses appropriate electronic equipment</p> <p><input type="checkbox"/> demonstrates ability to operate _____ efficiently</p> <p><input type="checkbox"/> demonstrates ability to operate _____ efficiently</p> <p><input type="checkbox"/> demonstrates ability to operate _____ efficiently</p> <p><input type="checkbox"/> models safe procedures and techniques</p> <p><input type="checkbox"/> follows procedures for upkeep, repairs and reordering of supplies</p> <p><input type="checkbox"/> minimizes waste of supplies</p>
4 3 2 1 0	<p><u>Works Collaboratively</u></p> <p><input type="checkbox"/> cooperates with group members</p> <p><input type="checkbox"/> shares work appropriately with group members</p> <p><input type="checkbox"/> negotiates solutions to problems</p>

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4 3 2 1 0	<p><u>The student:</u></p> <p><u>Preparation and Planning</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> sets goals and describes steps to achieve them <input type="checkbox"/> uses personal initiative to formulate questions and find answers <input type="checkbox"/> accesses a range of relevant in-school/community resources <input type="checkbox"/> interprets, organizes and combines information into a logical sequence <input type="checkbox"/> records information accurately with appropriate supporting detail and using correct technical terms <input type="checkbox"/> plans and uses time effectively <input type="checkbox"/> gathers and responds to feedback regarding approach to task and project status
4 3 2 1 0	<p><u>Content of Office Manual and/or Demonstration of Work Experience</u> – for written communications transmittals</p> <ul style="list-style-type: none"> <input type="checkbox"/> processes incoming mail – policies and procedures used for the opening, organizing and distributing of mail <input type="checkbox"/> processes outgoing mail – policies and procedures used for addressing, collecting, posting and delivering of mail including use of priority mail services <input type="checkbox"/> uses a variety of postal services – policies and procedures used when making decisions regarding the appropriate postal services or private couriers to use
4 3 2 1 0	<p><u>Presenting/Reporting (if applicable)</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> demonstrates effective use of at least two communication media: <i>e.g., <u>Written:</u> spelling, punctuation, grammar, format (formal/informal)</i> <i><u>Oral:</u> voice projection, body language, appearance</i> <i><u>Audio-visual:</u> techniques, tools, clarity</i> <input type="checkbox"/> maintains acceptable grammatical and technical standards through proofreading and editing <input type="checkbox"/> provides an introduction that describes the purpose and scope of the project <input type="checkbox"/> communicates ideas into a logical sequence with sufficient supporting detail <input type="checkbox"/> states a conclusion by synthesizing the information gathered

REFLECTIONS/COMMENTS

STUDENT: _____

STANDARD IS 2 IN EACH APPLICABLE TASK

Rating Scale

The student:

4	Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence.
3	Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively.
2	Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately.
1	Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately.
0	Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Observations of Students	CRITERIA
	<i>The student:</i>
4 3 2 1 0	<p><u>Preparation and Planning</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> sets goals and describes steps to achieve them <input type="checkbox"/> uses personal initiative to formulate questions and find answers <input type="checkbox"/> accesses a range of relevant in-school/community resources <input type="checkbox"/> interprets, organizes and combines information into a logical sequence <input type="checkbox"/> records information accurately with appropriate supporting detail and using correct technical terms <input type="checkbox"/> plans and uses time effectively <input type="checkbox"/> gathers and responds to feedback regarding approach to task and project status.
4 3 2 1 0	<p><u>Content of Travel Project—making arrangements for a business trip</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> creates a scenario for a planned business trip <input type="checkbox"/> contacts a minimum of two travel agencies to gather necessary information <input type="checkbox"/> makes decisions regarding who to book through and the rationale for the selection made. Consideration should be give to: <ul style="list-style-type: none"> • mode(s) of transportation • accommodation • passport/medical/insurance • currency <input type="checkbox"/> pays special attention to international travel <input type="checkbox"/> prepares itinerary in logical sequence of events, accurate and complete and arrangements for complimentary services if required <input type="checkbox"/> prepares budget and expense claims – accurate and supporting documents attached
4 3 2 1 0	<p><u>Presenting/Reporting</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> demonstrates effective use of at least two communication media: <i>e.g., <u>Written:</u> spelling, punctuation, grammar, format (formal/informal)</i> <i><u>Oral:</u> voice projection, body language, appearance</i> <i><u>Audio-visual:</u> techniques, tools, clarity</i> <input type="checkbox"/> maintains acceptable grammatical and technical standards through proofreading and editing <input type="checkbox"/> provides an introduction that describes the purpose and scope of the project <input type="checkbox"/> communicates ideas into a logical sequence with sufficient supporting detail <input type="checkbox"/> states a conclusion by synthesizing the information gathered <input type="checkbox"/> provides a reference list that includes five or more relevant information sources

REFLECTIONS/COMMENTS

STUDENT: _____

TRAINING SITE: _____

Observations of Student	CRITERIA
<p>4</p> <p>3</p> <p>2</p> <p>1</p> <p>0</p>	<p><i>The student:</i></p> <p><u>Preparation and Planning</u></p> <p><input type="checkbox"/> prepares self for task</p> <p><input type="checkbox"/> organizes and works in an orderly manner</p> <p><input type="checkbox"/> interprets and carries out instructions accurately</p> <p><input type="checkbox"/> demonstrates proper office etiquette</p> <p><input type="checkbox"/> plans and uses time effectively</p> <p><input type="checkbox"/> adheres to routine records management procedures</p>
<p>4</p> <p>3</p> <p>2</p> <p>1</p> <p>0</p>	<p><u>Uses an Alphabetic Records Management System</u></p> <p><input type="checkbox"/> uses a set of prescribed records to demonstrate hands-on experience in the use of an alphabetic records management system including:</p> <ul style="list-style-type: none"> • indexing of a minimum of 50 records using all of the basic alphabetic filing rules • using cross-references when necessary • filing records within an existing alphabetic records management system
<p>4</p> <p>3</p> <p>2</p> <p>1</p> <p>0</p>	<p><u>Retrieves Alphabetic Records from the System</u></p> <p><input type="checkbox"/> pulls specific records as required</p> <p><input type="checkbox"/> uses correct charge-out procedures; e.g., outguides or outfolders</p> <p><input type="checkbox"/> refiles records</p> <p><input type="checkbox"/> analyses strategies used during filing project</p> <p><input type="checkbox"/> makes recommendations for improved strategies</p>

STANDARD IS 1 EACH APPLICABLE TASK with 65% accuracy

Rating Scale

The student:

4	Exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence.
3	Meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively.
2	Meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately.
1	Meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately.
0	Has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

REFLECTIONS/COMMENTS