

**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 5th 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 5th 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 5th 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	Required meeting – Bring latest check stub

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	Required meeting – Bring latest check stub

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	Required meeting / Help session – Promotion connecting activity – Bring latest check stub
Tuesday	February 13	Connecting Activity Due: Pricing

MARCH, 2001

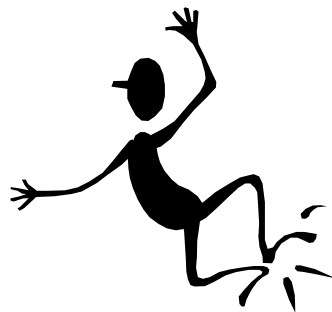
Friday	March 2	February wage and hour sheet due
Friday	March 9	Connecting Activity Due: Promotion

APRIL, 2001

Wednesday	April 4	March wage and hour sheet due
Tuesday	April 10	Required meeting / Help session – Purchasing connecting activity – Bring latest check stub
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



GRADING PERIOD 1 CONNECTING ACTIVITY #1: ORIENTATION TO THE WORKPLACE North Carolina Marketing Cooperative Education Program

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 |
| 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. | 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?) |
| 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? |
| | II. | Duties and Responsibilities of Your Job |
| 10 | A. | List specific duties and responsibilities of your job - be as detailed as possible. |
| 2 | 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
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?

What characteristics are essential for an effective manager or supervisor?

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

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

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

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

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

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

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

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?

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

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?

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

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	_____	TOTAL POINTS EARNED
	_____	BONUS: Trade journal or periodical included (5 points)
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

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

**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: _____

Business Image: _____

Number of Product Lines: _____

Depth of Product Lines: _____

Explanation of success: _____

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

NAME _____

Points Possible	Points Earned	Activity
<i>DESCRIBE THE PRODUCT MIX</i>		
4	_____	Number of product lines carried
10	_____	Five product lines identified
20	_____	Products in each line listed
8	_____	Explanation of product mix
<i>IDENTIFY STAGES OF THE PRODUCT LIFE CYCLE</i>		
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
<i>ANALYZE MARKETING STRATEGIES</i>		
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	_____	TOTAL POINTS EARNED
	_____	LESS: Penalty for late work (10 points per day) Date Submitted _____
	_____	FINAL GRADE

**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.

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

**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. _____

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

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

Sources of Research Information

List appropriate primary sources of information [2 points]

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

Plan for Gathering Information

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

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

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.

ITEM	RATING			
<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!

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	<u>TOTAL</u>
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		
TOTAL POINTS EARNED	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"> ◆ Identify which of the following pricing techniques are used at your training station and give examples. <ul style="list-style-type: none"> ☞ Promotional Pricing ☞ Prestige Pricing ☞ Odd/Even Pricing ☞ Price Lining ☞ Loss Leaders ◆ Explain why your company's pricing is consistent with its target market and business image. ◆ Choose three (3) products/services offered by your company. <ul style="list-style-type: none"> ☞ Record the price of each product/service. ☞ 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.) ☞ Visit a competitor that offers the same three products/services and record their prices. ◆ Analyze the reasons for the price similarities and/or differences.

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

Name: _____

Training Station: _____

Course: _____

Due Date: _____

PRICING TECHNIQUES

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

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

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

NAME _____

PRICING TECHNIQUES

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

Points Possible	Points Earned	Activity	TOTAL
15	_____	Explanation of consistency	_____

PRICE COMPARISON and ANALYSIS

Product #	Company #1 Price		Company #2 Price		Company #3 Price		TOTAL
	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	TOTAL
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"> ◆ Interview your manager about your company's current promotion activities. Use the Promotion Interview form. ◆ Develop a two-week promotion plan for an upcoming event at your training station.
Compare cost of various promotional media.	<ul style="list-style-type: none"> ◆ Calculate the cost of your two-week promotion plan. ◆ List sources, date obtained, and contact's name and phone number.

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

**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	TOTAL
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"> ◆ Determine three (3) budgets that are utilized in your training station. <ul style="list-style-type: none"> ☞ State the title of the person(s) responsible for determining the budget. ☞ State the title of the person(s) responsible for managing the budget. ☞ For each budget listed, explain how a budget cut would impact the operation of the business. Be specific and give examples. ◆ List 10 variable operating expenses used in your training station. ◆ List 4 fixed operating expenses used in your training station. ◆ Determine, on average, what percentage of gross sales are the company's returns and allowances. ◆ List the taxes that the company is responsible for paying. ☺ EXTRA CREDIT: Bring in a copy of the company's annual report and list the financial statements contained in the report.

**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

Everard, Kenneth E. and Burrow, James L., Business Principles and Management, Southwestern Educational Publishing, Cincinnati, OH, 1996.

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

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.