



SCHOOL-BASED ENTERPRISES CHAPTER CERTIFICATION

SCHOOL-BASED ENTERPRISES SBE

A **School-based Enterprise (SBE)** is an entrepreneurial operation in a school setting that provides goods/ services to meet the needs of the market. SBEs are managed and operated by students as hands-on learning laboratories that integrate National Curriculum Standards in Marketing, Finance, Hospitality or Management. SBEs provide realistic and practical learning experiences that reinforce classroom instruction. SBEs can sell to consumers through a permanent location, a mobile kiosk or through internet marketing. Products may include school spirit wear, food and beverage items, school supplies, signs and banners and more, while other SBEs provide services such as creative design, advertising sales and more.

PROGRAM DESCRIPTION

The School-based Enterprise (SBE) Chapter Certification Program provides recognition for outstanding achievement by school-based enterprises and motivates SBEs to strive for excellence and growth. The program provides SBEs with standards for model operations and recognition at three levels: bronze, silver and gold.

When submitting the Chapter Certification project, SBEs must indicate whether they specialize in Food Operations or Retail Operations. Utilize the following information to determine how to categorize your SBE:

FOOD OPERATIONS:

- product assortment includes food or beverage items prepared or assembled by students in the SBE, or hot food items prepared off-site and brought in to the SBE to sell
- food items account for largest percentage of items sold in the SBE and/or largest percentage of gross sales (either packaged foods or prepared foods)
- typical Food Operations SBEs might include coffee shops, snack shops, convenience style shops selling predominately packaged snacks, restaurants, cafes, lunch counters, etc.

RETAIL OPERATIONS:

- product assortment consists primarily of merchandise that is not food (school supplies, spirit wear, gifts, etc.)
- non-food items or services account for the largest percentage of items sold in the SBE and/or account for the largest percentage of gross sales
- pre-packaged snack foods might be a part of the product assortment, but do not account for the majority of product sales
- the SBE specializes in a service (graphic design, screen printing, credit union, consulting, etc.)

PROCEDURE

Members are to prove adherence to the achievement standards listed in these guidelines in order for the school-based enterprise to achieve certification for the 2022-2023 school year. The level of certification awarded depends on the number of performance indicators successfully documented within each of the 10 standards. This number varies per standard and will be specified under the heading of each. For some standards, all performance indicators must be documented. For others, members can choose to document a certain number of performance indicators depending upon the level of certification they are pursuing.

SBEs must submit their documentation to DECA Inc. via the online submission site sbe.decaregistration.com no later than 11:59 p.m. Eastern Standard Time on January 12, 2023. **All submissions must be uploaded via the website. Mailed submissions will not be accepted.**

KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills needed to address the components of the project as described in the content outline and evaluation forms.

National Curriculum Standards Instructional Areas:

- Financial Analysis
- Operations
- Marketing-Information Management
- Market Planning
- Product/Service Management
- Pricing
- Distribution/Channel Management
- Promotion
- Selling
- Human Resources Management

21st Century Skills

- **Critical Thinking and Problem Solving**
Reflect critically on learning experiences and processes
- **Collaboration and Teamwork**
Assume shared responsibility for collaborative work, and value the individual contributions made by each team member
- **Communication**
Use Communication for a range of purposes (e.g. to inform, instruct, motivate and persuade.)
- **Creativity and Innovation**
Be open and responsive to new and diverse perspectives; incorporate group input and feedback into the work

STATEMENT OF ASSURANCES

The statement of assurances will be acknowledged electronically via the submission site. Please review the language below with your students. Upon submitting the project online, advisors will be asked to confirm that their students understand and agree to abide by the requirements set by DECA.

1. The contents of this entry are the results of my work or the work of current members of this DECA chapter.
2. No part of this entry has previously been entered as part of the School-based Enterprises Certification Program.
3. Credit for all secondary research has been given to the original author through the project's bibliography, footnotes or endnotes.
4. All activities or original research procedures described in this entry are accurate depictions of my efforts or the efforts of my chapter.
5. All activities or original research described in this entry took place during this school year or the timeline specified in the Certification Guidelines.
6. I understand that DECA has the right to publish all or part of this entry. Chapters or individuals with extenuating circumstances may appeal the right to publish the entry to the executive committee of the board of directors prior to submission.

Advisors are strongly encouraged to review their students' documentation prior to submission to DECA Inc., as certification will be awarded based on the information provided with no opportunities for adding information once the project is submitted. Projects determined to have previously been entered as part of the SBE Certification Program will not be accepted and the SBE will automatically be disqualified from earning a certification for 2023.

REVIEW AND RECOGNITION

After the documentation has been reviewed, DECA Inc. will submit a list to chartered association advisors of SBEs that have been awarded certification. Chapter advisors will also receive official notification from DECA Inc. via email regarding the level of certification awarded. Judge evaluations will be accessible via the submission website after the certification results have been provided to all advisors.

SBEs awarded bronze and silver certification will receive a certificate and recognition at the association level. Gold certified SBEs will receive a certificate and plaque, and gold re-certified SBEs will receive a certificate and medallion. Gold certified and gold re-certified SBEs are also eligible to bring one to three student manager(s) to the 2023 SBE Academy at the International Career Development Conference (ICDC) in Orlando, Florida, with approval of their chartered association advisor. During the SBE Academy, students experience professional development sessions, network with other SBE managers and compete in front of judges with a prepared oral presentation based on one of the 10 instructional areas covered in the chapter certification project.

Gold certified SBEs may remain certified at that level for a total of five years by completing the requirements for re-certification for a total of four years after initial gold certification. The guidelines for certification and re-certification, along with sample gold level manuals, can be found at www.deca.org/sbe. After earning four re-certifications, the SBE must complete the original gold certification process to be eligible for the gold level certification award.

CERTIFICATION FORMAT

Each online submission should include the following which may be combined into one file or may be two separate files uploaded to the submission website (may be in PDF, Word Doc, or JPEG format):

1. Certification Manual (including title page, SBE description page, table of contents and body of report)
2. Photo of SBE

The Certification Manual should be formatted in the following sequence:

TITLE PAGE. The first page is the title page, and should list the following:

SCHOOL-BASED ENTERPRISE CERTIFICATION PROGRAM
Level of Certification Desired
Name of DECA Chapter
Name of Chapter Advisor
School Street Address
City/State/Zip Code
School Phone Number
Advisor E-mail Address
Date
Food Operations or Retail Operations submission

SBE DESCRIPTION. The second page is a one-page description/summary of your school-based enterprise. This page should be a general overview of your SBE and briefly address the following:

- target market
- revenue
- product mix
- location
- strategic goals for the school year

TABLE OF CONTENTS. The third page is the table of contents, which must list the name of every standard and the page on which the documentation for each standard begins. The table of contents may be single-spaced and may be one or more pages long.

BODY OF SBE CERTIFICATION DOCUMENTATION. Use the standard being documented as the heading for each section, and use the specific performance indicators as your sub-headings. Include photos, graphs, charts and related supplemental information within each corresponding sub-section. (Supplemental documentation is optional unless otherwise indicated as mandatory within each standard.)

BIBLIOGRAPHY. If applicable.

CHECKLIST STANDARDS

- The entry must be submitted by the chapter advisor online at sbe.decaregistration.com. The username and password to access the site are the same as the advisor log-in information for the DECA membership system. Step-by-step submission instructions can be found at www.deca.org/sbe.
- Body of report is 50 pages or less.
- Include chapter name and state in footer with page numbers.
- Major content of the written entry must use size 12 font. Figures and exhibits, headings, lists, sample forms, etc. may use smaller font.
- SBE photo included (preferably uploaded to the submission site as its own file—but embedded within the manual is also acceptable.)

STANDARD 1: FINANCIAL ANALYSIS

GOLD LEVEL: COMPLETE ALL

SILVER LEVEL: COMPLETE ANY 5

BRONZE LEVEL: COMPLETE ANY 4

Explain the role of finance in business.

- Explain the significance of finance and how it can determine the ultimate success of the SBE.
- Describe how students are involved in fiscal management and how the engagement has impacted their knowledge of successful business operations.

Describe the need for financial information.

- Discuss why financial information is needed to provide information about the operations, economic outlook, and cash flow of the SBE.
- Explain why it is essential to read, understand and analyze financial information to effectively run the SBE.

Describe the nature of budgets.

- Explain the importance of budgets for the SBE.
- Describe how students are involved in the budgeting process and student decision-making with the SBE budget.
- Include a copy of the SBE budget.

Make responsible financial decisions.

- Provide details of how responsible financial decisions impact the operations of the SBE.
- Discuss how student financial decisions have impacted the operations of the SBE. Include decisions that were successes and challenges for the SBE.

Maintain the financial records.

- Describe how financial records are kept and used for the SBE and discuss the importance of financial record keeping.
- Include examples of how records have impacted the operations of the SBE.
- Include copies of financial records used for the SBE.
- Discuss the learning impact fiscal responsibility has with students involved in the SBE

Describe the use of technology in the financial-information management function.

- Describe the types of technology used for financial-information management in the SBE.
- Discuss how information technology systems used by the SBE can automate or customize financial reporting.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Financial Analysis.

STANDARD 2: OPERATIONS

GOLD LEVEL, SILVER LEVEL, BRONZE LEVEL: COMPLETE ALL

Open/Close register/terminal.

- Describe how the SBE opens and closes business each day, including student responsibilities.
- Explain the significance of proper opening and closing tasks and the significance to your SBE.

Follow instructions for use of equipment, tools and machinery.

- Describe in detail the types of equipment, tools and machinery used in the SBE, including the location, use and student responsibilities regarding equipment and machines.
- Discuss training and checks and balances in regard to equipment used in the SBE.
- Discuss how students are trained to use equipment and tools necessary for the SBE. Describe who is responsible for the training and what steps are taken to ensure safety.

Describe health and safety regulations in business.

- Describe in detail the health and safety regulations set forth by the school, district, county and/or state in regard to operation of your SBE.
- Include food safety, fire and emergency safety, and other precautions/trainings and regulations that must be addressed and practiced. If applicable, provide additional information on occurrences that have arisen and what action has been taken.

Explain routine security precautions.

- Discuss in detail the routine measures that ensure overall security in the SBE, including advisor and student responsibilities.
- Describe activities and tasks that are required by the SBE, school and district that have a positive or negative impact on the SBE.
- Discuss the impact of student learning in regard to operational safety procedures and regulations.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Operation Standards.

STANDARD 3: MARKETING-INFORMATION MANAGEMENT
GOLD LEVEL, SILVER LEVEL, BRONZE LEVEL: COMPLETE ALL

Describe the need for marketing data.

- Describe data-driven marketing. Include the advantages and challenges that can impact the SBE.
- Discuss the marketing data the SBE collects and provide examples of how the information is used.

Identify data monitored for marketing decision-making.

- Describe in detail the decisions made based on marketing data. Include product decisions, price decisions, place (distribution) decisions and promotion decisions.
- Include student decision-making responsibilities and how these decisions have impacted the SBE.

Track trends (e.g., social, buying, social media, advertising agency, etc.).

- Describe the importance of tracking trends in business, provide examples of types of industry trend analysis. Include how the SBE monitors trends.
- Discuss the challenges and opportunities of tracking trends in the SBE.

Analyze customer behavior (e.g., media-consumption, buying, etc.).

- Explain the importance of customer behavior to drive business decisions. Include customer acquisition, customer retention and customer growth.
- Provide examples of student decision-making in analyzing customer behavior and the impact of their decisions on the SBE.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Marketing-Information Management Standards.

STANDARD 4: MARKET PLANNING
GOLD LEVEL, SILVER LEVEL, BRONZE LEVEL: COMPLETE ALL

Develop customer profile.

- Create a customer profile by describing your SBE's average customer in detail. Include demographic and psychographic information.
- Discuss the average amount of dollars spent by customers and what affects changes in customer decisions.
- Address how students use customer profiles to enhance business decisions.

Conduct market analysis (market size, area, potential, etc.).

- Describe in detail the market analysis conducted to determine product purchases and customer service offerings.
- Provide real examples of how market analysis has impacted decision making for product development and customer approval.
- Include student learning activities that strengthened product purchases and placement.

Explain strategies for linking performance measures to financial outcomes.

- Discuss student responsibilities in tracking sales and customer demand and the impact demand has on business operations.
- Provide examples where product demand influenced other SBE decisions in product, purchasing or other operational strategies.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Market Planning Standards.

STANDARD 5: PRODUCT/SERVICE MANAGEMENT

GOLD LEVEL: COMPLETE ALL

SILVER LEVEL: COMPLETE ANY 4

BRONZE LEVEL: COMPLETE ANY 3

Identify components of a retail image.

- Provide a detailed description of the SBE image from all levels (students, faculty, administration, district, community).
- Discuss how the SBE is viewed as a community-oriented, service-oriented and/or price-oriented business by customers. Include examples.
- Share any relevant changes or upgrades in the past year to the SBE's image. Include student roles in addressing the changes.

Choose vendors.

- Discuss student responsibilities in the vendor selection process. Include considerations for new vendors, adding new product selections, and requirements and feasibility of keeping current vendors.
- Explain how student decisions have impacted the operation of the SBE. Include student involvement in selecting new merchandising, changing merchandise offers, etc.
- Provide specific examples of the vendor selection processes as well as any challenges that have occurred.

Plan merchandise assortment (e.g., styling, sizes, quantities, colors).

- Discuss the width, length, depth and consistency of the SBE product line. Provide information on the brand mix.
- Explain the process for planning merchandise assortment. Describe how this impacts the SBE operation.
- Share how students are involved in determining product lines and mix of brands.

Determine stock turnover.

- Discuss and provide examples of stock turnover for the SBE.
- Describe student decisions that ensure appropriate stock turnover by product lines; include steps determined to avoid over-stocking and/or inadequate inventory levels.

Plan reductions (e.g., anticipated markdowns, employee/other discounts, stock shortages).

- Discuss student responsibilities in merchandise planning. Include information on potential reductions such as sale items, discounts, and/or markdowns.
- Explain the process for handling challenges with pricing and turnover. If no reductions are offered, explain how the SBE has addressed the issue.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Product/Service Management Standards.

STANDARD 6: PRICING

GOLD LEVEL, SILVER LEVEL, BRONZE LEVEL: COMPLETE ALL

Explain the nature and scope of the pricing function.

- Provide detailed and specific examples of the pricing strategies used by the SBE and how they are implemented in the business.
- Discuss the impact pricing strategies have on sales. Include information, as applicable, on seasonal pricing, competition pricing, bundle pricing, psychological pricing, product line pricing, cost plus/cost based/value cost pricing, etc.
- Describe students' role in pricing strategies. Include time lines and tasks that indicate student participation.

Explain factors affecting pricing decisions.

- Discuss various ways product's prices were determined and explain how prices impact the SBE.
- Provide specific examples of student pricing decisions that involve a variety of products and various cost determinations (break-even point, ROI and markup).
- Discuss how pricing decisions are evaluated for effectiveness. Provide detailed and specific examples of the success of the pricing strategies used by the SBE.
- Describe student learning outcomes derived from success and/or failure of the pricing plan

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Pricing Standards.

STANDARD 7: DISTRIBUTION/CHANNEL MANAGEMENT

GOLD LEVEL: COMPLETE ALL

SILVER LEVEL: COMPLETE ANY 3

BRONZE LEVEL: COMPLETE ANY 2

Explain the relationship between customer service and distribution.

- Discuss student roles in establishing positive customer relationships. Share specific duties and responsibilities that reach beyond good customer service (greeting and thanking customers).
- Explain how the timing of orders, stock rotation and product availability has affected your SBE's ability to provide customers with goods and services. Provide examples when appropriate.

Explain the receiving process.

- Provide a detailed description of the merchandise receiving process, including student responsibilities. Explain the importance of the process for the SBE.

Complete inventory counts.

- Explain the process for inventory control in your SBE, including physical, perpetual or a combination of both. Share student roles/responsibilities in the process.
- Include any learning outcomes that have been met through proper control of receipt and distribution of inventory.

Determine inventory shrinkage.

- Discuss the types of shrinkage the SBE has encountered. Share steps the SBE has taken to ensure limited shrinkage.
- Describe the role student employees play in shrinkage control.
- Provide real examples of how shrinkage affects the SBE financial picture.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Distribution/Channel Management Standards.

STANDARD 8: PROMOTION

GOLD LEVEL: COMPLETE ALL

SILVER LEVEL: COMPLETE ANY 4

BRONZE LEVEL: COMPLETE ANY 3

Explain the nature of a promotional plan.

- Describe the SBE promotional objectives for the school year. Include information on learning activities and tasks that have been implemented.
- Include information supporting the promotional budget and how it was incorporated into the promotional mix.

Explain the use of visual merchandising in retailing.

- Describe how visual merchandising is implemented in your SBE. Include decisions, examples and discussion on the importance of appropriate visual merchandising for your SBE.
- Share student roles in the visual merchandising component of the SBE.

Use cross-merchandising techniques.

- Provide specific details your SBE uses for cross-merchandising strategies. Include examples of cross merchandising various products and its impact on the SBE.
- If your SBE only has one product, discuss how this product could be paired (crossed) with products from another organization within the school to promote sales.

Plan special events.

- Describe all special events the SBE has completed or planned for the year and the impact it has had on the business.

Identify ways to track marketing-communications activities.

- Provide examples of how students have evaluated the effectiveness of the SBE's promotional strategy.
- Discuss the learning impact promotional strategy has had with students involved in the SBE.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Promotion Standards.

STANDARD 9: SELLING

GOLD LEVEL: COMPLETE ALL

SILVER LEVEL: COMPLETE ANY 4

BRONZE LEVEL: COMPLETE ANY 3

Determine customer/client needs.

- Discuss how students determine customer/client needs and the actions students have taken to address these needs.
- Share how employees engage with customers, particularly indecisive and/or unhappy customers, so that their needs are met.

Establish relationship with customer/client.

- Discuss how employees build customer/client relationships. Include information beyond initial greeting and thanking customers.
- If SBE is virtual, provide information and examples of establishing an online relationship with customers/clients.

Demonstrate suggestion selling.

- Discuss how routine suggestive selling techniques are provided. Include student training opportunities for increasing customer sales.
- Describe how negative customers might impact sales and policies for addressing customer complaints.

Process sales documentation.

- Explain the process for documenting sales and how the tracking of sales impacts the SBE.
- Describe a typical customer transaction in your SBE.

Process returns/exchanges.

- Discuss the SBE return policy and the impact it has on the business. Include information that is being considered for future operation of the SBE.
- Share how a recent change or update in the return policy affected the SBE, if applicable.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Selling Standards.

STANDARD 10: HUMAN RESOURCES MANAGEMENT

GOLD LEVEL, SILVER LEVEL, BRONZE LEVEL: COMPLETE ALL

Discuss the nature of human resources management.

- Describe the acquisition and selection process for store employees.
- Describe the process of training and developing employees to become efficient and work toward the goals of the SBE.
- Provide a description of how employees are motivated to do their job well. Include information on self-motivation, SBE competition, sales quotas, appreciation activities, etc.
- Discuss how the SBE maintains employees and if it provides any tangible benefits to its employees. Include information of providing a safe and healthy environment.

Foster “right” environment for employees.

- Describe the processes in place to ensure a positive working environment for employees.
- Describe special considerations provided for student employees, including special events or incentives to boost morale.

Train staff.

- Discuss how to conduct formal and informal employee training. Include instructor-led training, on-the-job training, any job rotation programs or mentoring/coaching by more experienced employees.
- Discuss how the SBE functions as a learning laboratory for students.

Assess employee performance.

- Explain the various methods used to measure and evaluate employee performance used in the SBE.
- Describe student responsibilities in evaluating employee performance (peer evaluation, self-evaluation) and include student learning activities that strengthened overall performance.

OPTIONAL SUPPORTING DOCUMENTS

- Include optional photos, charts, graphs, etc. to further illustrate Human Resources Management Standards.



VERIFICATION OF AWARD ACHIEVEMENT LEVEL CHECKLIST

DECA Inc. will verify to assure that SBEs have adhered to the following format and guidelines.

___ Documentation included the following (may be combined into one file or individual files uploaded to submission site):

- Title Page
- SBE Summary Page
- Table of Contents
- Body of SBE Certification Documentation (written documentation plus any additional documentation for each of the necessary performance indicators within each standard)

___ Documentation follows sequence as outlined in the guidelines

___ Number of pages limited to 50 (excluding title page, summary page, table of contents and appendix)

___ Major content of the written entry must use size 12 font. Figures and exhibits, headings, lists, sample forms, etc. may use smaller font.

___ Entry typewritten or word-processed

___ SBE photo (JPG, PDF or Word Doc format) included as separate file or embedded within body of report

JUDGE SCORING

A maximum score of **“Exceeds Expectations”** in any category means that, in the judge’s opinion, the information is presented effectively and creatively; nothing more could be expected for that performance indicator.

A **“Meets Expectations”** rating means that the information is presented well. Though there may be a few minor problems or omissions, they are not significant. Creativity, however, is not shown to any great degree.

A **“Below Expectations”** score means that the information presented does not meet minimum standards of acceptability.

A **“Little/No Value”** score means either that some major flaw has been noted that damages the effectiveness of the information (this may be a major omission, a serious misstatement, poor writing or any other major flaw) or that the information presented is of no value (does not address the performance indicator at all.)

SBE documentation for the following sections should consist of a written description of achievement and other documentation as appropriate/needed. Reviewer's assessment of documentation appears to the right of each performance indicator.

1. FINANCIAL ANALYSIS

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|---|---------------------|-----------------------|-----------------------|-------------------------|
| Explain the role of finance in business | | | | |
| Describe the need for financial information | | | | |
| Describe the nature of budgets | | | | |
| Make responsible financial decisions | | | | |
| Maintain the financial records | | | | |
| Describe the use of technology in the financial-information management function | | | | |

___ Meets Bronze Level Standard (Must achieve 4 performance indicators)

___ Meets Silver Level Standard (Must achieve 5 performance indicators)

___ Meets Gold Level Standard (Must achieve all performance indicators)

2. OPERATIONS

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|---|---------------------|-----------------------|-----------------------|-------------------------|
| Open/Close register/terminal | | | | |
| Follow instructions for use of equipment, tools and machinery | | | | |
| Describe health and safety regulations in business | | | | |
| Explain routine security precautions | | | | |

___ Meets Bronze, Silver and Gold Level Standard (Must achieve all performance indicators)

3. MARKETING-INFORMATION MANAGEMENT

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|---|---------------------|-----------------------|-----------------------|-------------------------|
| Describe the need for marketing data | | | | |
| Identify data monitored for marketing decision-making | | | | |
| Track trends (e.g., social, buying, social media, advertising agency, etc.) | | | | |
| Analyze customer behavior (e.g., media-consumption, buying, etc.) | | | | |

___ Meets Bronze, Silver and Gold Level Standard (Must achieve all performance indicators)

4. MARKET PLANNING

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|---|---------------------|-----------------------|-----------------------|-------------------------|
| Develop customer profile | | | | |
| Conduct market analysis (market size, area, potential, etc.) | | | | |
| Explain strategies for linking performance measures to financial outcomes | | | | |

___ Meets Bronze, Silver and Gold Level Standard (Must achieve all performance indicators)

5. PRODUCT/SERVICE MANAGEMENT

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|--|---------------------|-----------------------|-----------------------|-------------------------|
| Identify components of a retail image | | | | |
| Choose vendors | | | | |
| Plan merchandise assortment (e.g., styling, sizes, quantities, colors) | | | | |
| Determine stock turnover | | | | |
| Plan reductions (e.g., anticipated markdowns, employee/other discounts, stock shortages) | | | | |

___ Meets Bronze Level Standard (Must achieve 3 performance indicators)

___ Meets Silver Level Standard (Must achieve 4 performance indicators)

___ Meets Gold Level Standard (Must achieve all performance indicators)

6. PRICING

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|--|---------------------|-----------------------|-----------------------|-------------------------|
| Explain the nature and scope of the pricing function | | | | |
| Explain factors affecting pricing decisions | | | | |

___ Meets Bronze, Silver and Gold Level Standard (Must achieve all performance indicators)

7. DISTRIBUTION/CHANNEL MANAGEMENT

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|--|---------------------|-----------------------|-----------------------|-------------------------|
| Explain the relationship between customer service and distribution | | | | |
| Explain the receiving process | | | | |
| Complete inventory counts | | | | |
| Determine inventory shrinkage | | | | |

___ Meets Bronze Level Standard (Must achieve 2 performance indicators)

___ Meets Silver Level Standard (Must achieve 3 performance indicators)

___ Meets Gold Level Standard (Must achieve all performance indicators)

8. PROMOTION

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|--|---------------------|-----------------------|-----------------------|-------------------------|
| Explain the nature of a promotional plan | | | | |
| Explain the use of visual merchandising in retailing | | | | |
| Use cross-merchandising techniques | | | | |
| Plan special events | | | | |
| Identify ways to track marketing-communications activities | | | | |

___ Meets Bronze Level Standard (Must achieve 3 performance indicators)

___ Meets Silver Level Standard (Must achieve 4 performance indicators)

___ Meets Gold Level Standard (Must achieve all performance indicators)

9. SELLING

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|---|---------------------|-----------------------|-----------------------|-------------------------|
| Determine customer/client needs | | | | |
| Establish relationship with customer/client | | | | |
| Demonstrate suggestion selling | | | | |
| Process sales documentation | | | | |
| Process returns/exchanges | | | | |

___ Meets Bronze Level Standard (Must achieve 3 performance indicators)

___ Meets Silver Level Standard (Must achieve 4 performance indicators)

___ Meets Gold Level Standard (Must achieve all performance indicators)

10. HUMAN RESOURCES MANAGEMENT

| PERFORMANCE INDICATOR | LITTLE/ NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | EXCEEDS EXPECTATIONS |
|--|---------------------|-----------------------|-----------------------|-------------------------|
| Discuss the nature of human resources management | | | | |
| Foster "right" environment for employees | | | | |
| Train staff | | | | |
| Assess employee performance | | | | |

___ Meets Bronze, Silver and Gold Level Standard (Must achieve all performance indicators)