

*Public District School Board Writing Partnership*

# Course Profile

## **Introduction to Retail and Services Marketing**

Grade 11  
Workplace Preparation  
BMX3E

• *for teachers by teachers*

This sample course of study was prepared for teachers to use in meeting local classroom needs, as appropriate. This is not a mandated approach to the teaching of the course. It may be used in its entirety, in part, or adapted.

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## Course Overview

### Introduction to Retail and Services Marketing

#### Course Description

This course focuses on developing knowledge and applying skills in the context of retail and services marketing. Students learn about the importance of customer service, analyse the methods used to maintain customer loyalty, examine ways in which product presentation influences buyers, and investigate the critical factors in inventory control, including the role of technology.

#### Course Notes

“Workplace preparation courses are designed to equip students with the knowledge and skills they need for direct entry into the workplace or for admissions to apprenticeship programs and other training programs offered in the community. The range and content of the courses offered allow students to prepare for a variety of jobs, training programs, and careers. Teaching and learning will emphasize workplace applications of the course content, but will also explore the theoretical material that underlies these practical applications.” “Workplace preparation courses will be based on rigorous provincial curriculum expectations and will emphasize the development of generic employment skills, as well as independent research and learning skills. Workplace preparation courses in particular should also promote and stress the importance of lifelong learning.” *Ontario Secondary Schools, Grades 9 to 12, Program And Diploma Requirements, 1999.* p. 17.

This profile represents only one of the many possible ways in which teachers can approach curriculum implementation. Teachers using this profile are encouraged to use the information presented and to develop activities that respond to individual student and local needs.

Safety is a very important issue that should be emphasized by the teacher. Topics of discussion should include the environment, trip safety, security, ethics, legal requirements of working on-line, and interview precautions. Special emphasis should be placed on part-time and summer jobs, as many students are either employed or looking for employment. An enthusiastic student/employee can also be an informed one about the safety and security issues. A safety resource produced by The Ontario Ministry of Labour is found in the overview resources.

Students are required to work collaboratively throughout the course. Therefore, addressing conflict management is important to student success. At the beginning of the course, the teacher should address this issue, emphasizing that not all conflicts can be resolved, but that people can always choose how to handle them. Steps to conflict resolution: define the conflict; state the problem; check your perceptions; generate and evaluate a list of possible decisions/alternatives; reach a mutually acceptable decision; implement and evaluate the decision. If the decision is satisfactory, students continue their work; if the decision is unsatisfactory, students should repeat the process. Different cultures perceive conflict differently – what constitutes conflict and how to resolve problems may vary from culture to culture. These issues have a direct bearing on what and how the teacher evaluates in the process area. Self-, peer, group, and teacher assessment forms also help deflect conflict and solve problems.

Throughout this course teachers should refer to and make use of the school’s Guidance and Career Education Program Plan (*Choices Into Action*). This plan is available in the Guidance/Student Services area, the principal’s office, or from members of the school’s Program Advisory Team. Students can utilize career-access software (e.g., *Career Cruising* and *Career Explorer* listed under Career Resources) to explore job descriptions, working conditions, earnings, education, and career paths for jobs in information technology. Students should be aware of the dynamic nature of the cooperative learning experience and business career paths available to them.

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Adult students provide the teacher with a resource (the adult student's knowledge and experiences) on which to draw. Some forms of teaching strategies may be more suitable, for example, panel discussion. Teachers should be sensitive to the possibility of family-oriented time constraints and make adjustments where possible.

It is advisable for teachers to identify and gain the participation of local businesses, wherever possible. Teachers are encouraged to develop an in-class display of community businesses and to highlight existing partnerships. Also, teachers might access a variety of community business links that reflect the diversity of the local school community and complement course content.

Periodic access to computer technology, including the standard office productivity tools, such as word processors, spreadsheets, databases, e-mail, and the Internet, are a requirement of this course. Ideally, teachers should be able to access a computer lab during class time. If whole-class computer access is not possible on a planned basis, teachers should ensure that the Library/Resource Centre or other Internet access points are available after or before class.

The expectations groupings or clusters for this course start with an introductory unit to identify and explain the basics of retail and services marketing. The next grouping brings together those expectations dealing with careers in this field. The thought for placing this unit second was to emphasize its importance in the course. The next two groupings deal with the traditional four Ps of marketing as they pertain to retail and services marketing. Unit 3 deals with the product, pricing, distribution, and retail locations, while Unit 4 deals with promotion of sales through advertising and sales promotion, personal selling, and the visual aspects of retailing. The final grouping includes those expectations dealing with knowing and understanding consumer behaviour, and with the future directions of retail and services marketing.

Using a student-run school store as an integral part of this course can be an effective way to use a hands-on learning approach to address many of the required expectations, and a valuable adjunct in the learning of others. In The Marketing Process strand, students see the place of their store and its relation to other types of stores. They understand their market and see differences from other market segments. They can experiment with marketing research techniques to answer their questions. This can involve researching their market as well as other marketers – even other school stores – to compare marketing techniques. Students address the Elements of Retail and Services Marketing strand by discovering different channels through which they might acquire goods for resale. They must also determine pricing levels by understanding all of the factors, which lead to profit or loss, and actually calculate prices to charge. They learn which means of advertising and promotion are most effective and can bring modern technology into the promotional mix.

The Retail Systems and Operations strand contains expectations central to the school store. Expectations in the customer service realm are included here, as well as merchandise types, visual presentation, store layout and design, inventory control, and human resources topics. These areas are all integral to the operation of a school store.

The experience gained in the promotion, sales, management, and operations functions of a school store can provide a window for students to careers in the real world and assist in addressing the expectations contained in the Career Opportunities in Retail and Service Businesses strand.

The Personal Portfolio serves as the culminating activity throughout the course. Ultimately students develop a personal marketing plan that highlights the strengths, accomplishments, and employability skills required to gain entry into the field of retail and services marketing. It also includes examples of their work from various units that demonstrate their abilities and illustrate their creativity in a marketing and retail environment.

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This profile is designed to provide a clear, easy-to-use document for the teacher. The written expectations have been incorporated into the elements of Unit Overview Charts to enable the teacher to quickly identify what is suggested in each unit and support the teacher in the development and implementation of the curriculum.

### Units: Titles and Times

* Unit 1	Today's Retail Environment	27.25 hours
Unit 2	Retail And Services Marketing is for You	16.25 hours
Unit 3	The Product	20.5 hours
Unit 4	Elements of Selling	24 hours
Unit 5	Knowing the Consumer	22 hours

\* This unit is fully developed in this Course Profile.

## Unit Overviews

### Unit 1: Today's Retail Environment

**Time:** 27.25 hours

#### Unit Description

Unit 1 functions as an introduction to the course and focuses on the importance of students' fundamental understanding of today's retail environment. This activity cluster strives for a balance of traditional modelling of skills and knowledge together with a blend of small group and individual exploration. One approach to the first cluster of expectations has students, in a large group activity, brainstorm examples of the major types of businesses in the retail and service sector. Start with a list of the types, e.g., fashion retailing, automotive retailing, food marketing, travel and tourism, and financial services. Have students give names of businesses that fit the major types and discuss businesses that compete directly. Bring in grocery store organization, department store organization. Compare how two of the common anchor stores in malls are organized and develop organizational structures by product and by function. Deal with competition. In as a small groups students plan to open a store in a local mall, give the store type, (e.g., pizza store, fitness centre) and look at competition for that type. The teacher might assess the group activity with a checklist of how they functioned within the group. The checklist could be used by students to self- or peer assess as well. (For checklists see Resources for Unit 1.)

In Activity 2, students develop a definition of retail marketing by using a concept web in a large group activity. There could be one web on retail and one web on marketing; then a synthesis of the webs. The teacher might use the chart developed on competing businesses from Activity 1 to build on the skills for effective marketing. Using Think/Pair/Share, each group could add to the charts and briefly explain their additions. The assessment focus might be the success of the concept web and chart. Do they clearly explain the information? Brainstorm components and descriptive details, create the rubric and apply it.

Activity 3 looks at the effect of globalization on product, on competition and how products come from all over the world.

In Activity 4, the teacher could lead small-group research on municipal, provincial, and federal regulations. It could be done through expert groups or as simply as notes made on chart paper. Groups share their information. The teacher might use this as a lead up to talk about environment and interrelationship with the economic system. An alternative method is for the teacher to supply a newspaper or magazine article concerning government regulation of business (e.g., municipal smoking by-laws; provincial trucking safety regulations; federal fishery regulations). As a pencil-and-paper exercise, students may address the following issues: Identify the business activity the government is trying to regulate. What changes are required by the regulations? How will the changes impact on the business activity? List the advantages and disadvantages of the regulations. Explain your supported opinion on the issue.

The Activity 5 cluster is a culminating activity, a mall tour. Students can e-search to a virtual mall tour. The teacher would need to cover on-line etiquette along with on-line shopping safety. (Surf-Right found at [www.tcdsb.on.ca](http://www.tcdsb.on.ca) is an example of a school district policy.) The activity could be expanded to a real life mall tour. Trip safety and school board policies on safety need to be addressed.

In Activity 6, the personal portfolio can be started. The portfolio is an ongoing activity throughout the units. Students build on the knowledge and skills developed in each unit. To stress the importance of a personal portfolio the teacher might share their personal portfolio. Students could develop a personal fact sheet and resume and revisit the information the student developed in the Grade 10 Career Studies course to add to their portfolio.

The written expectations have not been included in the Unit Overview Chart as Unit 1 is developed in full, and the written expectations appear there. The expectations are included in the subsequent unit charts.

**Strand(s):** The Marketing Process, Retail Systems and Operations, Career Opportunities in Retail and Service Businesses

**Overall Expectations:** MPV.01, MPV.03, MPV.04, ROV.04, COV.03, RSV.01.

**Unit Overview Chart**

Act.	Time	Specific Expectations	Assessment	Focus
1	6.25 hours	MP1.03, RS1.03, RS1.04, MP3.01, MP3.02, MP3.04, MP3.05, RO4.01	Knowledge/Understanding Thinking/Inquiry Communication Application	Today's Retail Marketing Environment
2	3.75 hours	MP1.01, MP1.02	Knowledge/Understanding Thinking/Inquiry Communication Application	Retail Marketing
3	3.5 hours	MP3.05, MP4.04, RO5.03	Knowledge/Understanding Thinking/Inquiring Communication Application	Globalization
4	5 hours	MP4.01, MP4.03, RO5.03	Knowledge/Understanding Thinking/Inquiring Communication Application	Economic Systems

5	5 hours	MP1.03, MP3.01, MP3.02, MP3.03, MP3.04, RO4.01	Knowledge/Understanding Thinking/Inquiring Communication Application	Culminating Activity: Competition
6	3.75 hours	CO3.03	Knowledge/Understanding Thinking/Inquiry Communication Application	Personal Portfolio

## Unit 2: Retail and Service Marketing is for You

**Time:** 16.25 hours

### Unit Description

In Activity 1 students explore a range of careers in the retailing and service sectors. Students utilize career-access software (e.g., *Career Cruising*, *Career Explorer*) to explore job descriptions, working conditions, earnings, education, and career paths for jobs in retail and service industries.

The second activity cluster addresses skill banks for successful employment. Students look at personal characteristics and skills required by retailers and prepare a gap analysis (e.g., What do you have? What do you need? What are you going to do to acquire the skills?). Students might develop a checklist and self-evaluate their skills. The teacher may want to link with local businesses and arrange for guest speaker(s).

In the third cluster the teacher might arrange a field trip to the local employment centre. The school or board trip safety policy should be reviewed. Students can search for five job postings (electronic or print) and use a chart to identify skills, qualifications, earning, etc. for each job listing. Students then might create cover letters tailored to the job postings.

The fourth activity cluster provides an opportunity for students to develop interview skills. The teacher could lead a discussion on safety tips for interviews (e.g., check out the company's validity, always share the location and time of the interview, phone ahead before the interview, if you feel uncomfortable about any part, don't go). The teacher might arrange for educational personnel (e.g., Human Resources Department of the school board, the Principal, or Department Head) to talk about the interview process. In small groups students could develop possible interview questions based on the jobs researched and role-play interviews.

**Strand(s):** Career Opportunities in Retail and Services Marketing, Retail Systems and Operations

### Overall Expectations

COV.01 - determine strategies for effective career exploration in the retail and service sectors;

COV.02 - evaluate the growth areas for future job opportunities in the retail and service industries;

COV.03 - develop a personal marketing plan;

ROV.04 - describe the importance of the human resources function to retail and service businesses.

### Unit Overview Chart

Act.	Time	Specific Expectations	Assessment	Focus
1	2 hours	CO1.01 - use computer software to investigate the range of careers in the retail and service sectors; CO1.02 - research positions available within various areas of the retail and service industries; CO1.03 - identify programs that provide opportunities for training within these employment sectors.	Knowledge/ Understanding Thinking/ Inquiry Communication Application	Range of Careers

2	3 hours	CO2.01 - describe the skills, aptitudes, and attitudes needed for success in the retail and service industries; RO4.04 - identify the essential skills and characteristics that an employer in a retail or service business values when considering a prospective employee; CO3.02 - describe key characteristics and skills needed to obtain employment; CO2.02 - evaluate their personal employability skills; CO2.03 - develop a personal growth plan to acquire the necessary skills and aptitudes.	Knowledge/ Understanding Communication Application	Skills
3	8.25 hours	CO3.01 - describe methods of identifying employment opportunities; RO4.02 - compare a variety of job descriptions and job specifications for positions in a retail or service business; CO3.03 - organize a personal portfolio that includes a résumé, a covering letter, and letters of recommendation.	Thinking/ Inquiry Application Communication	Finding the Right Fit
4	3 hours	CO3.04 - develop appropriate job-interview techniques; RO4.03 - describe methods of remuneration commonly used by retail and service businesses.	Communication Application	Getting Ready for an Interview

### Unit 3: The Product

**Time:** 20.5 hours

#### Unit Description

The expectations of this unit focus on the product and its influence on retail and services marketing. In this unit students identify types of retailers and product classifications; determine factors affecting product pricing; acquire knowledge regarding the buying, handling and inventory management of products; recognize product distribution channels and the process of choosing an optimal retail location in which to offer a product/service.

In Activity 1, it is important that students distinguish between types of retail operations and classification of products. This can be accomplished by means of a brainstorming session or having students develop a word cluster. They can reflect on their own shopping experiences and note differences in terms of store layouts, customer service, prices, etc. or they can visit various types of retailers and take note of these differences. (Remember to address School Safety Procedures as well as Board Policies regarding Field Trips). Students recognize and understand differences between impulse, shopping goods, and convenient goods by having them list and categorize products/services that they have purchased.

In the second activity cluster, the focus shifts to product pricing. Students become familiar with different pricing strategies used by retailers. They learn the “law of supply and demand” are being introduced to the arithmetic of retail pricing as well as the costs of doing business (i.e., fixed/variable costs). Case scenarios and application problems can follow this up. You might want to involve specific products sold within the school (e.g., school clothing, school store products, cafeteria food) in demonstrating applications.

The third activity cluster deals with buying, handling, and inventory management. It is important that students acquire an understanding of the “Buying Cycle”. This topic as well as the other related expectations included in this activity could be part of a field trip assignment. (Remember to address School Safety Procedures as well as Board Policies regarding Field Trips.) By allowing groups of students to visit various local supermarkets and meeting with a store manager, they gain vast knowledge with regards to operating procedures. Students can write reports and present their findings to the class. If students have access to computers and presentation software, they could incorporate multi-media into their presentations. General conclusions on operating procedures may be drawn from the field trip findings. You may also want students to research and compare the operating procedures of the School Store, the Business Department or the operations of the entire school.

Activity 4 deals with the distribution of products. In addition to identifying the types of distribution channels and the optimal channels for various products, it is important to emphasize the growth of Big Box and Mega Mall retailers as well as advancements in technology and its impact on product distribution. You may want to discuss how this shift in consumer preference impacts you as a consumer and as a retailer.

In activity cluster 5, the focus shifts to retail location. Students become familiar with the process and importance of finding a retail location and become aware of the advantages and disadvantages of the different types of locations such as strip malls, shopping malls etc. It is recommended that this be followed up with an application project that involves students to go through the process of selecting optimal retail locations; preparing reports and presenting their findings.

In concluding this unit, it is important to provide students with an opportunity to update their portfolios by including sample work and directing them to acquire letters of recommendation, which will also be included in their portfolio.

**Strand(s):** The Marketing Process, Elements of Retail and Services Marketing, Retail Systems and Operations, Career Opportunities in Retail and Service Business

**Overall Expectations**

RSV.01 - compare the retail marketing of a product with that of a service;

ROV.02 - describe merchandise presentation techniques;

RSV.03 - evaluate the factors involved in pricing a product properly;

MPV.04 - summarize the influence of economic factors, government regulation, and globalization on the retail and service business environments;

ROV.03 - identify and describe various methods of inventory control;

RSV.02 - describe the various channels of distribution used by retail and service businesses;

COV.03 - develop a personal marketing plan.

**Unit Overview Chart**

<b>Act.</b>	<b>Time</b>	<b>Specific Expectations</b>	<b>Assessment</b>	<b>Focus</b>
1	2 hours	RS1.02 - classify various types of retail and service business operations; RS1.01 - differentiate among types of products that are offered by retail and service businesses; RO2.01 - identify and describe the various classifications of merchandise.	Knowledge/ Understanding Thinking/ Inquiry	Types of Retailers and Product Classification

2	5 hours	<p>RS3.03 - describe the factors that determine the pricing strategies used by retail and service businesses;</p> <p>RS3.01 - explain how the interaction of the forces of supply and demand can affect product pricing in retail or service businesses;</p> <p>MP4.02 - explain how the interaction of the forces of supply and demand affects marketing in the retail and service industries;</p> <p>RS3.04 - demonstrate an understanding of how a product's retail price is calculated based on an established gross margin;</p> <p>RS3.02 - identify the fixed and variable costs commonly associated with operating a retail or service business establishment.</p>	<p>Knowledge/ Understanding Communication Application</p>	<p>Determining Price</p>
3	4.25 hours	<p>RO3.01 - identify and describe the steps involved in the ordering process;</p> <p>RO3.02 - explain the importance of proper receiving procedures;</p> <p>RO3.03 - identify various pricing methods used by retail businesses;</p> <p>RO3.04 - describe various inventory control methods used by retail businesses;</p> <p>RO3.05 - explain the importance of computer technology in inventory control;</p> <p>RS3.02 - identify the fixed and variable costs commonly associated with operating a retail or service business establishment.</p>	<p>Knowledge/ Understanding Communication</p>	<p>Buying, Handling and Inventory Management</p>
4	3.75 hours	<p>RS2.01 - differentiate among the various channels of distribution;</p> <p>RS2.02 - explain changes in the distribution of goods and services due to changes in customer shopping preferences;</p> <p>RS2.03 - explain changes in the distribution of products due to changes in information technology.</p>	<p>Knowledge/ Understanding Thinking/ Inquiry</p>	<p>Distribution</p>
5	5 hours	<p>RS2.04 - analyse the factors contributing to the selection of virtual or real locations by retail and service businesses.</p>	<p>Thinking/ Inquiry Application Communication</p>	<p>Choosing a Location</p>
6	0.5 hour	<p>CO3.03 - organize a personal portfolio that includes a résumé, a covering letter, and letters of recommendation.</p>	<p>Thinking/ Inquiry Communication</p>	<p>Personal Portfolio</p>

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## **Unit 4: Elements of Selling**

**Time:** 24 hours

### **Unit Description**

This unit groups expectations dealing with various aspects of selling. The first activity cluster focuses on promoting retail sales. Students learn the suitability, advantages, and disadvantages of various advertising media to the requirements of retailers, and note variations among different retailers: chain vs. single store; nation- or region-wide vs. local; electronics store vs. grocery. They look at other promotional activities besides media advertising used by retailers and learn how new technology can aid this process: collect data about customer buying habits; and identify customer groups to directly target for promotional activities. To apply the knowledge they collect and/or describe examples of advertisements for two retailers, note the similarities and differences, compare national and local ads, and evaluate their relative effectiveness. Students use communication skills by selecting a product or product category and creating campaign advertisements for one or more media for that product/category. Also they develop plans for other promotional activities, which would supplement the campaign. Another application would use a school event as the product and create advertising and promotional activities to promote the event. Examples include promoting a school dance or a school athletic event.

In the second activity cluster, students look at personal selling and customer service. They describe the steps in a retail sale used in personal selling. These steps can include: pre-sale activities; approaching the customer; determining wants and needs; presenting the product; overcoming objections; closing the sale; suggestion selling and trading up; entering and recording the sale; taking leave; and follow-up activities. They should explain the differences between product features, advantages, and benefits to the customer, then select a product and create a brief which outlines these for the chosen product. Students could then role-play selling situations using the products previously selected. To describe the various point-of-sale systems used for entering sales and making payments, they can visit selected retailers and observe their systems. To investigate the topic of customer service, students learn the concept of customer-focus in the culture of a retailer. Include service expectations of customers, which can vary among different stores and different time periods. Also, students learn about the customer's service expectations gap, which may exist positively or negatively for a store. They identify and describe customer loyalty programs used by retailers: Air Miles; Canadian Tire Money and Options programs; Zellers' Club Z, etc. They identify other services that may be part of various retail operations. To end the topic of customer service they could discuss examples of customer complaints with stores from personal experience. Comment on how they were handled and the customer's satisfaction level at the outcome. Decide if a better resolution should have been the result.

The third activity cluster deals with visual display and store design. Students describe typical store layouts and note the elements of store design, such as window displays, layout, merchandise grouping, design, lighting, fixtures, and signage, and how these contribute to goals such as efficient use of space and creating the desired store image. They learn rules and principles of merchandise displays. To apply this knowledge students visit retailers and sketch the store layout for each, noting how the elements of store design contribute to the goals previously discussed. Trip safety and school board trip policies need to be addressed. Students compare display rules and principles to actual displays in the stores visited. They describe how computer technology can be used to produce an effective design for the premises of retail or service business.

In Activity 4, the personal portfolio, students should complete some examples of application forms (or forms similar to those) used by local retailers.

**Strand(s):** The Marketing Process, Elements of Retail and Services Marketing, Retail Systems and Operations, Career Opportunities in Retail and Service Businesses

**Overall Expectations**

- MPV.01 - evaluate the contribution of the retail and service industries to the marketing process;
- MPV.03 - identify and describe the factors that affect competition;
- RSV.01 - compare the retail marketing of a product with that of a service;
- RSV.04 - analyse a variety of promotional strategies that can be applied in retail and service business environments;
- ROV.01 - evaluate effective customer service techniques;
- ROV.02 - describe merchandise presentation techniques;
- COV.03 - develop a personal marketing plan.

**Unit Overview Chart**

Act.	Time	Specific Expectations	Assessment	Focus
1	11.5 hours	RS4.01 - identify the elements of an effective promotional mix; RS4.02 - describe promotional strategies that have been used effectively by a number of retail and service businesses; MP3.04 - compare the strengths and weaknesses of the promotional activities of two different companies; RS4.03 - demonstrate how technology can be used effectively in promotion activities; RS4.04 - describe retail marketing techniques and approaches that can be used to promote a selected product to different markets.	Knowledge/ Understanding Thinking/ Inquiry Communication Application	Promoting Retail Sales
2	8.125 hours	RO1.02 - explain why product knowledge is important in customer-focused selling; MP1.02 - describe the skills that are important to effective retail selling; RO1.04 - explain the steps of the selling process; RO1.03 - describe the point-of-sale systems currently in use; RO1.05 - describe the methods used by retailers to maintain customer loyalty; RO1.01 - describe how customer service increases sales in successful businesses; RS1.05 - describe the attributes of successful retail and service businesses.	Knowledge/ Understanding Thinking/ Inquiry Communication	Personal Selling and Customer Service
3	3.75 hours	RO2.02 - compare different visual display techniques in several retail environments; RO2.03 - describe how computer technology can be used to produce an effective design for the premises of a retail or service business; RO2.04 - classify the various store designs of local retailers.	Knowledge/ Understanding Thinking/ Inquiry Application	Visual Display and Store Design
4	0.625 hours	CO3.03 - organize a personal portfolio that includes a résumé, a covering letter, and letters of recommendation.	Application Communication	Personal Portfolio

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## **Unit 5: Knowing the Consumer**

**Time:** 22 hours

### **Unit Description**

Students learn about the importance of knowing and understanding the consumer in a changing retail environment. They also learn the buying decision process consumers make today. It provides students with an understanding of consumer behaviour and leads into how retailers take advantage of such knowledge. Finally, this unit also provides students with a focus on what is happening in the retail and service sector today and the direction it is headed (e.g., technology, trends, and changes) in the future.

In the first activity students develop an understanding of what is meant by the term Marketing Research and explore the various types. Through a teacher-directed lesson, students become familiar with the steps in a Marketing Research Study. In groups of four, have students define a problem/need within the school (e.g., school dance, sporting event, student council). Each group conducts a marketing research project, in which they gather both primary and secondary data, develop a questionnaire, interpret the data, and present their findings to the class.

In the second activity cluster, students deal with the Buying Decision Process and Market Segmentation. In groups have students brainstorm how they think a consumer makes a buying decision. On chart paper have each group present their findings. The teacher can lead students through the Buying Decision Process. In pairs, students discuss and illustrate what today's retailers are doing to help potential consumers buy more effectively. Supplementary material for this topic could include a case study. Through a teacher-directed lesson explain the difference between demographics and psychographics (lifestyle). Generate a teacher-led discussion on how the changing demographics and lifestyles have changed within the last several years, and illustrate how this has affected marketing in the retail/service sector (e.g., more women entering the workforce causing an increase in fast food/cleaning services).

In the third activity, computer time is required. Students find a local retailer in the community who would like a webpage created to promote their business. Trip safety and school board policies on safety would need to be addressed. Through the guidance of the teacher and retailer, students define the target market and strategize how they will capture it. An additional assignment that would complement this material is Internet Shopping vs. The Old Fashion Way, can be found in Unit 5 Resources.

In the fourth activity, the personal portfolio, students build their portfolio by including the webpage designed for the retailer in the above cluster.

**Strand(s):** The Marketing Process, Elements of Retail and Services Marketing, Retail Systems and Operations, Career Opportunities in Retail and Service Business

### **Overall Expectations**

MPV.01 - evaluate the contribution of the retail and service industries to the marketing process;

MPV.02 - analyse the role of consumers in retail and services marketing;

ROV.05 - analyse current and emerging trends in retail and services marketing;

RSV.02 - describe the various channels of distribution used by retail and service businesses;

COV.03 - develop a personal marketing plan.

**Unit Overview Chart**

<b>Act.</b>	<b>Time</b>	<b>Specific Expectations</b>	<b>Assessment</b>	<b>Focus</b>
1	6.5 hours	MP2.05 - explain the importance of marketing research.	Communication Thinking/ Inquiry	Importance of Marketing Research
2	7 hours	MP2.01 - relate changing demographics and lifestyles in Canada to changes in the tastes, preferences, and priorities of Canadian consumers; MP2.02 - relate changes in consumer needs and wants over the past few decades to changes in retail and service businesses; MP2.03 - identify the types of consumer groups that use specific retail and service businesses within their community; MP2.06 - explain the process by which consumers make a buying decision; RS2.05 - describe the variations in marketing techniques used to place products in different markets.	Knowledge/ Understanding Thinking/ Inquiring Communication Application	Understanding the Retail Customer
3	8 hours	MP2.02 - relate changes in consumer needs and wants over the past few decades to changes in retail and service businesses; MP2.04 - describe how information technology has had an impact on businesses' ability to identify and respond to customer needs; RO5.01 - identify current trends in the retail and service industries; RO5.02 - evaluate consumer and population trends that will likely affect retail and service businesses in the future; RO5.03 - describe ways in which changes in information technology might influence markets, marketing techniques, and consumer buying habits in the future; MP1.01 - define retail marketing; RS2.03 - explain changes in the distribution of products due to changes in information technology.	Knowledge/ Understanding Communication Application	What is happening today in the Retail Market Place and where are we going
4	0.5 hour	CO3.03 - organize a personal portfolio that includes a résumé, a covering letter, and letters of recommendation.	Communication	Personal Portfolio

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## Teaching/Learning Strategies

This profile has a conscious quest for a balance of traditional modelling of skills and knowledge together with a blend of small group and individual practice and individual exploration. Concepts and ideas that students discover are usually internalized more deeply and retained with greater meaning than ideas that are passively received in didactic fashion. When students report and discuss discoveries with fellow students and the teacher, the learning is consolidated and enhanced. Educational research has shown that guided instruction and interactive learning are cornerstones of efficient teaching practice.

The strategies are listed to provide a means for teachers to quickly reflect on what they have used in the past and what they can adopt.

**Teacher-directed strategies**, in which the teacher directs the learning, have a definite place in this course as students learn to handle a broad range of topics. Teachers may find the strategies in this category useful as ways to model how to set up anything from notebooks or databases, to present complex concepts or simply to make the best use of time in some parts of the course. Lecture, Questioning, Visual organizers, Record/task sheet, Demonstration, Group discussion, Guest Speakers, Field Trip, Mnemonics (trigger recall) are commonly used examples.

**Learner-centred strategies**, which are activity-based, provide students with the opportunities to actively apply what they have learned. These strategies enable students in developing problem solving as well as collaborative skills.

- Brainstorming: Chunking, Carousel Brainstorming, Graffiti;
- Reaching Consensus: Snowball;
- Listening and Communication: Say and Switch, Three-Step Interview;
- Reaction/Opinion: Reaction Wheel, Agree/Disagree, Corners, Think/Pair/Share, Roundtable, Connections, Round Robin Reflection, Journaling;
- Graphic Organizers: Future Wheel, Semantic Mapping, Mind Mapping, Flow Chart, Sequence Chart, Ranking Ladder, Tree Diagram, Venn Diagram, The Fish Bone, The Right Angle; Reflection:
- Stems and Starters, Ticket to Leave, Role-playing.

**Self-directed strategies**, may be used to promote independence and self-reliance. The benefits of the use of such strategies are that students learn to take responsibility for and manage their own learning. The university/college preparation courses require an emphasis on the development of both independent research skills and independent learning. Sharing, Displays, Research, Electronic Media Research, Computer-assisted learning, Text Referencing, Note taking, Study Notes, Checklists, and Questionnaires are explained in the Pedagogy Resources

## Assessment & Evaluation of Student Achievement

Teachers should employ assessment strategies frequently and throughout the course in order to communicate the expectations of the course to students, to make appropriate adjustments to teaching and learning strategies as required to provide feedback to students to improve their learning, and to accommodate the special needs of students. Student input to the assessment process itself should be welcomed and valued.

The teacher may find it useful to provide exemplars of the different levels of achievement.

Some strategies, which are consistent with the assessment techniques referred to in the activities, are presented below.

- Share the rubrics for culminating activities at the beginning of the unit, so expectations and criteria are clear for students and can be used to support the learning in all activities in the unit.
- Develop rubrics with students, or involve them in translating them into student language.
- Emphasize the language of assessment and evaluation in your discussions with students.
- Provide sample work demonstrating achievement at different levels for students.

- Use the results of diagnostic and formative assessment to modify the delivery of the unit.
- Provide different opportunities to assess the achievement of the expectations.
- Provide opportunities for self-and-peer assessment to be used as formative assessment to support and improve student learning.
- Provide multiple opportunities for students to demonstrate their achievement of expectations.
- Provide opportunities for students to repeat assignments until they can demonstrate their mastery.
- Develop tests that provide opportunities to demonstrate all categories on the Achievement Chart as much as possible and demonstrate achievement at all levels.
- Give practice tests as an opportunity for formative assessment.
- Use assessment tools that are appropriate for the expectations being addressed and which relate to the categories on the Achievement Chart.
- Provide prompt feedback so that students can use it to improve their learning.
- Design a variety of assessment tasks to address different learning styles.
- Provide choice in activities/assessments tasks to accommodate the diverse needs of the learners in the classroom.
- Provide opportunities for students to track their own progress.

### Assessment Purposes

Assessment may be diagnostic, formative, and summative. Diagnostic assessment includes informal observation checklists, quizzes and all class questions and answers. The following strategies and tools may be used for both formative and summative purposes.

Method	Strategy	Tool
Paper-and-Pencil	Test - selected response - true/false - constructed response	Marking Scheme
Performance Task	Oral presentation Science experiment lab report Debate	Rubric Checklist
Personal Communication	Student-teacher conference Classroom question and answer	Rating Scale Anecdotal record

Learning skills, effort, punctuality and recorded absences are reported separately and are not considered in the determination of the percentage grade. The evaluation is based on testing, product development, and product delivery using a variety of media. Factored into this evaluation is the degree to which a student uses both independent and collaborative product development strategies.

Marking schemes and rubrics used for evaluation should be organized to include the four achievement categories or for as many as are applicable. One student-generated product, process, etc. may be evaluated under multiple categories: Knowledge and Skills, Thinking/Inquiry, Communication, and Application categories. The teacher's record keeping would require that four separate scores be recorded for that assignment, one for each of the four categories it addresses.

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## Final Course Evaluation

“When planning courses and assessment, teachers should review the required curriculum expectations and link them to the categories to which they relate. Teachers should ensure that all the expectations are accounted for in instruction, and that the achievement of the expectations is assessed within the appropriate categories” (*The Ontario Curriculum, Grades 11 and 12, Business Studies, 2000*, p. 125). Teachers must ensure that a student’s most consistent performance level is reflected in his/her final grade. Teachers must also provide a variety of opportunities for students to demonstrate their achievement of the expectations.

Seventy percent of the grade is based on the assessments/evaluations conducted throughout the course. The additional thirty percent consists of the personal portfolio as well as a written examination or culminating activity. Both of these final evaluation components should incorporate the four categories of assessment (Knowledge/Understanding, Thinking/Inquiry, Communication, and Application).

## Accommodations

Teachers should address exceptional students’ Individual Educational Plans (IEPs) and consult with the appropriate support staff. This will allow teachers to effectively implement the prescribed modifications. The following are common, frequently used strategies listed by exceptionalities to reaffirm the good teaching practices found in Ontario classrooms.

**Reading difficulties:** read questions first, modify reading requirements, use reading partners, pre-teach concepts/vocabulary, highlight notes, use visuals.

**Math difficulties:** check work after each example; use concrete materials, calculator, and graph paper; modify the complexity of examples.

**Memory difficulties:** teach students to verbalize concepts, check daily assignments are recorded in planner, insist students write things down, provide lists and flow charts, give visual clues.

**Written language difficulties:** vary assignments, give explicit instructions, allow more time, provide photocopied notes, allow point-form notes and graphic organizers, use peer editing, and teach spell/grammar check.

**Motivation difficulties:** ensure students see an end in sight and a purpose for their activities; negotiate both process and product; provide authentic contexts; maintain contact with home.

## ESL Accommodations

- English-speaking students can help their ESL classmate by repeating, rephrasing, and writing words down.
- Bilingual tutors, if available, may facilitate clarification in first language.
- Provide peer tutors and give them specific responsibilities.
- Give recognition to partners for undertaking responsibilities.
- Avoid all ESL groupings.
- Encourage ESL students to use their first language for clarification and explanation.
- Provide students with a summary sheet that can be used at the end of each class (with teacher assistance) to list main terms or concepts that were the focus of the lesson.
- Make overheads of handouts on which the teacher highlights important terms, explains words, and clarifies instructions, etc. while students do the same on their copy.
- Provide a glossary of terms for the reading for students with special needs.
- Encourage the use of first language dictionaries for assignments and assessments.
- Pair written instructions with verbal instructions.
- Provide visual and auditory clues.
- Ask an ESL/ELD teacher to review questions, assignments, or assessment instruments.
- Prior work may be needed to familiarize ESL students with the process and vocabulary of rubrics.

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- Some ESL students will need extensive instructions on assessment processes that are not teacher centred.
  - Allow for early success so ESL students do not get overwhelmed and discouraged.
  - Allow extra time where possible for oral responses, writing assignments, and tests.

### **Enrichment Accommodations**

The teacher can enrich the process or thinking skills and the products or outcomes of the learning to extend the expectations and challenge the gifted learner by:

- requiring multiple and sophisticated forms of communication;
- encouraging and reinforcing the application of abstract thinking skills to complex content, resulting in a sophisticated product;
- integrating cross-curricular activities;
- allowing for in-depth learning of a self-selected product topic within the expectation requirements;
- being cognizant of the fact that students may be gifted in one area and not in others;
- suggesting the DECA (Distributive Education Clubs of America) and OBEA (Ontario Business Educators Association) contests;
- allowing students to demonstrate mastery of content through preferred style of learning;
- motivating students to synthesis course content with their own experiences and ideas.

### **Resources**

**Note:** The URLs for the websites have been verified by the writers prior to publication. Given the frequency with which these designations change, teachers should always verify the websites prior to assigning them for student use.

#### **General Resources**

##### **Pedagogy Print**

Bennett, B., Carol Rolheiser-Bennett, and Laurie Stevahn. *Cooperative Learning Where Heart Meets Mind*. Toronto: Educational Connections, 1991. ISBN 0-4444-555-6

Gibbs, Jeanne. *Tribes: A Process for Social Development and Cooperative Learning*. Santa Rosa: 1996. ISBN 0-932762-08-5

Harper, M, Ken O'Connor, and Marilyn Simpson. *Quality Assessment: Fitting The Pieces Together*. Toronto: OSSTF Educational Services Committee, 1999. ISBN 0-920930-47-6

Theory and examples of self-, peer, teacher, and group assessment.

##### **Safety**

*Live Safe! Work Smart! Health and Safety Resources for Ontario Secondary School Teachers*. Queen's Printer for Ontario, 2000. ISBN 0-7794-0226-X. Ministry of Labour Publications Department, 1-416-326-7731

Health & Safety Site: [www.ccohs.ca/](http://www.ccohs.ca/) Canadian site for occupational health and safety.  
<http://www.mightymedia.com/ttalk/index.asp>

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## **General Internet**

Study Web – <http://www.studyweb.com/> (extensive research library of annotated links in 25 categories)

Toronto Star Technology – <http://www.thestar.com/editorial/technology/index.html>

The Globe And Mail – <http://www.theglobeandmail.com/index.html>

The National Post – [http://www.nationalpost.com/news.asp?s2=national"](http://www.nationalpost.com/news.asp?s2=national)

MacLean's – <http://macleans.ca>

Canoe (Canadian Newsstand and Information) – <http://www.canoe.com/>

## **Canadian Retail and Service Business Websites**

Air Canada – <http://www.aircanada.ca>

Aldo Shoes – <http://www.aldoshoes.com>

Altamira Financial Services – <http://www.altamira.com>

Bell Canada Enterprises – <http://www.bce.ca>

Bootlegger – <http://www.bootlegger.com>

Brick, The – <http://www.thebrick.com>

Canadian Tire – <http://www.canadiantire.ca>

Chapters.ca – <http://www.chapters.ca>

Club Monaco – <http://www.clubmonaco.com>

Daimler Chrysler Canada – <http://www.chryslercanada.ca>

Danier Leather – <http://www.danier.com>

Ford of Canada – <http://www.ford.ca>

Four Seasons Hotels and Resorts – <http://www.fourseasons.com>

Future Shop – <http://www.futureshop.com>

Gap – <http://www.gapinc.com>

HMV – <http://www.hmv.com>

Hudson's Bay Company – <http://www.hbc.com>

Indigo – <http://www.indigo.ca>

Legalhome.com Inc. – <http://www.legalhome.com>

McDonald's Corporation – <http://www.mcdonalds.com>

Nevada Bob's Golf – <http://www.nevadabobs.ca>

Rent A Goalie – <http://www.rentagoalie.com>

Retail Council of Canada – <http://www.retailcouncil.org>

Roots – <http://www.roots.com>

Sam The Record Man – <http://www.samscd.com>

Sears Canada – <http://www.sears.ca>

Staples/Business Depot – <http://www.staples.ca>

Tommy Hilfiger Inc. – <http://www.tommy.com>

Wendy's Corporation – <http://www.wendys.com>

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## Unit 1

Laroche, Michael and Gordon H.G. McDougall. *Canadian Retailing*, 4th ed. Toronto: McGraw-Hill Ryerson Ltd., 2000, pp. 16-18. ISBN 0-07-086044-0

Murphy, Terry G., Rob Kelley, Roy McMillan, and Jack Wilson. *The World of Business – A Canadian Profile*, 3rd ed. Scarborough, Ontario: Nelson Canada, 1994, pp. 119-157

### Video

*Economix*. Montreal, QC: National Film Board of Canada and the Kativik School Board in cooperation with the Canadian Foundation for Economic Education.

Notman, David and Jack Wilson. *The World of Business – Video Series – 3rd ed. – Teacher’s Resource*. Scarborough, Ontario: ITP Nelson, 1997, p. 20.

Wilson & Notman. *World of Business Video Series*. Toronto. Nelson Canada & CBC. Teachers Resource Unit 1 Profile of Business ISBN 0-17-606584-9 Unit 2 International Business ISBN 0-17-606585-7 Unit 4 & 5 Money and Financial Institutions, Credit and Personal Finance ISBN 0-17-606587-3 Unit 6 You, The Consumer ISBN 0-17-606588-1 Unit 7 Accounting ISBN 0-17-606589-X Unit 8 Marketing ISBN 0-17-606569-5 Unit 9 Canadian Law. ISBN 0-17-606590-3

## Unit 2

Stoyles, Harold. *Marketing Today: A Retail Focus*. Canada: McGraw-Hill Ryerson Ltd., 1988. ISBN 0-07-549190-7

Career Cruising – <http://www.careercruising.com/home/index/html>

Career Explorer – <http://cdn.cx.bridges.com/>

Curriculum Vitae Tips – <http://www.cvtips.com>

Job Shark – <http://www.jobshark.ca/caeng/index.cfm>

Resume Dot Com – <http://www.perservices.com/>

## Unit 3

Housted, S., R. Mason, and P. Rath. *Marketing Practices and Principles*, 4th ed. USA: McGraw-Hill Inc., 1986. ISBN 0-07-040705-3

Laroche, Michael and Gordon H.G. McDougall. *Canadian Retailing*, 4th ed. Toronto: McGraw-Hill Ryerson Ltd., 2000. ISBN 0-07-086044-0

Levin, Sandy. *Marketing Dynamics*. Toronto: Cop Clark Pitman Ltd., 1990. ISBN 0-7730-4971-1

Stoyles, Harold. *Marketing Today: A Retail Focus*. Canada: McGraw-Hill Ryerson Ltd., 1988. ISBN 0-07-549190-7

Taylor, Terry. *Marketing: A Canadian Perspective*, 2nd ed. Canada: McGraw-Hill Ryerson Ltd., 1989. ISBN 0-07-549523-6

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## Unit 4

Farese, L., G. Kimbrell, and C. Woloszyk. *Marketing Essentials*, 2nd ed. New York: Glencoe McGraw-Hill, 1997. ISBN 0-02-640601-2

Laroche, M. and G. McDougall. *Canadian Retailing*, 4th ed. Toronto: McGraw-Hill Ryerson Limited, 2000. ISBN 0-07-086044-0 – Retail Advertising, Sales Promotion and Publicity: Chapter 13, pp. 310-342; Customer Service: Chapter 14, pp. 346-365; Visual Display and Store Design: Chapter 8, pp. 181-203

Stoyles, Harold J. *Marketing Today: A Retail Focus*, 2nd ed. Toronto: McGraw-Hill Ryerson Limited, 1994. ISBN 0-07-551428-1 – Personal Selling: Chapter 13, pp. 263-291

Wilson & Notman. *World of Business Video Series*. Toronto: Nelson Canada & CBC. Video and Teachers Resource Unit 8 Marketing. Program 3, Flops. 3:24 min.; Program 1, Buggy Wars. 13:34 min. Program 4, Sold On Service. 6:15 min.

Wilson & Notman. *World of Business Video Series*. Toronto: Nelson Canada & CBC. Video and Teachers Resource Unit 6 You The Consumer. Program 3, Commercial Claims. 1:40 min. Film: Secrets of Selling: How Stores Turn Shoppers Into Buyers

## Unit 5

Levin, S. *Marketing Dynamics*. Toronto: Copp Clark Pitman Ltd., 1990. ISBN 0-7730-4971-1

Laroche, Michel and Gordon McDougall. *Canadian Retailing*. USA: McGraw-Hill Ryerson Limited, 2000. ISBN 0-07-086044-0, Case Study p. 463, p. 401, pp. 20-22

## OSS Considerations

*The Ontario Curriculum, Grades 11 and 12, Business Studies, 2000.*

*The Ontario Curriculum, Grades 9 to 12, Program Planning and Assessment, 2000.*

*The Ontario Curriculum, Grades 9 to 12, Choices Into Action: Guidance and Career Education Program Policy For Ontario Elementary And Secondary Schools, 1999.*

*Ontario Secondary Schools, Grades 9 to 12, Program and Diploma Requirements, 1999.*

**Note:** Introduction to Retail and Services Marketing, Grade 11, Workplace Preparation may be counted as an additional compulsory credit for diploma purposes.

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# Coded Expectations, Introduction to Retail and Services Marketing, Grade 11, Workplace Preparation, BMX3E

## The Marketing Process

### Overall Expectations

- MPV.01 · evaluate the contribution of the retail and service industries to the marketing process;
- MPV.02 · analyse the role of consumers in retail and services marketing;
- MPV.03 · identify and describe the factors that affect competition;
- MPV.04 · summarize the influence of economic factors, government regulation, and globalization on the retail and service business environments.

### Specific Expectations

#### The Retail and Service Sectors

- MP1.01 – define retail marketing;
- MP1.02 – describe the skills that are important to effective retail selling;
- MP1.03 – describe the major types of business in the retail and service sectors (e.g., fashion retailing, automotive retailing, food marketing, travel and tourism, financial services);
- MP1.04 – explain the ways in which emerging information technologies have affected retail and service businesses.

#### Consumers and Marketing

- MP2.01 – relate changing demographics and lifestyles in Canada to changes in the tastes, preferences, and priorities of Canadian consumers;
- MP2.02 – relate changes in consumer needs and wants over the past few decades to changes in retail and service businesses (e.g., consumer demand for fast food, portable communication devices);
- MP2.03 – identify the types of consumer groups that use specific retail and service businesses within their community;
- MP2.04 – describe how information technology has had an impact on businesses' ability to identify and respond to customer needs;
- MP2.05 – explain the importance of marketing research;
- MP2.06 – explain the process by which consumers make a buying decision.

#### Competition

- MP3.01 – identify retail or service businesses that compete directly with one another;
- MP3.02 – demonstrate an understanding of how businesses compete with one another for customers;
- MP3.03 – analyse the effects of competition on consumer and business behaviour;
- MP3.04 – compare the strengths and weaknesses of the promotional activities of two different companies (e.g., a department store, a major grocery chain);
- MP3.05 – describe the effects of globalization on competition.

#### The Influence of Economic Factors, Government Regulation, and Globalization

- MP4.01 – identify the major characteristics of Canada's economic system;
- MP4.02 – explain how the interaction of the forces of supply and demand affects marketing in the retail and service industries;
- MP4.03 – identify regulations made at the three levels of government that affect retail and service businesses;
- MP4.04 – relate increased globalization to changes in retail and service businesses in Canada.

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## Elements of Retail and Services Marketing

### Overall Expectations

- RSV.01** · compare the retail marketing of a product with that of a service;
- RSV.02** · describe the various channels of distribution used by retail and service businesses;
- RSV.03** · evaluate the factors involved in pricing a product appropriately;
- RSV.04** · analyse a variety of promotional strategies that can be applied in retail and service business environments.

### Specific Expectations

#### Products and Types of Enterprises

- RS1.01** – differentiate among types of products that are offered by retail and service businesses (e.g., durable, non-durable);
- RS1.02** – classify various types of retail and service business operations (e.g., discount, specialty, and catalogue);
- RS1.03** – compare the various forms of business ownership available to retail and service businesses;
- RS1.04** – explain the growth of franchise and chain-store operations;
- RS1.05** – describe the attributes (e.g., sales capabilities and product knowledge) of successful retail and service businesses.

#### Product Distribution

- RS2.01** – differentiate among the various channels of distribution;
- RS2.02** – explain changes in the distribution of goods and services due to changes in customer shopping preferences (e.g., megamalls, big-box retailing);
- RS2.03** – explain changes in the distribution of products due to changes in information technology (e.g., the virtual mall, the Internet);
- RS2.04** – analyse the factors contributing to the selection of virtual or real locations by retail and service businesses;
- RS2.05** – describe the variations in marketing techniques used to place products (e.g., consumer products, wholesale products) in different markets.

#### Product Pricing

- RS3.01** – explain how the interaction of the forces of supply and demand can affect product pricing in retail or service businesses;
- RS3.02** – identify the fixed and variable costs commonly associated with operating a retail or service business establishment;
- RS3.03** – describe the factors that determine the pricing strategies used by retail and service businesses;
- RS3.04** – demonstrate an understanding of how a product's retail price is calculated based on an established gross margin.

#### Product Promotion

- RS4.01** – identify the elements of an effective promotional mix (e.g., publicity, sales promotion, personal service, advertising);
- RS4.02** – describe promotional strategies that have been used effectively by a number of retail and service businesses;
- RS4.03** – demonstrate how technology can be used effectively in promotion activities;
- RS4.04** – describe retail marketing techniques and approaches that can be used to promote a selected product (e.g., jeans, computers) to different markets.

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## Retail Systems and Operations

### Overall Expectations

- ROV.01 · evaluate effective customer service techniques;
- ROV.02 · describe merchandise presentation techniques;
- ROV.03 · identify and describe various methods of inventory control;
- ROV.04 · describe the importance of the human resources function to retail and service businesses;
- ROV.05 · analyse current and emerging trends in retail and services marketing.

### Specific Expectations

#### Customer Service

- RO1.01 – describe how customer service increases sales in successful businesses;
- RO1.02 – explain why product knowledge is important in customer-focused selling;
- RO1.03 – describe the point-of-sale (P.O.S.) systems currently in use (e.g., cash register, credit card, debit card, declining-balance card);
- RO1.04 – explain the steps of the selling process (e.g., pre-approach, approach);
- RO1.05 – describe the methods used by retailers to maintain customer loyalty.

#### Merchandise Presentation

- RO2.01 – identify and describe the various classifications of merchandise (e.g., shopping goods, impulse items);
- RO2.02 – compare different visual display techniques in several retail environments;
- RO2.03 – describe how computer technology can be used to produce an effective design for the premises of a retail or service business;
- RO2.04 – classify the various store designs of local retailers.

#### Inventory Control

- RO3.01 – identify and describe the steps involved in the ordering process;
- RO3.02 – explain the importance of proper receiving procedures;
- RO3.03 – identify various pricing methods used by retail businesses (e.g., price tags, UPC);
- RO3.04 – describe various inventory control methods used by retail businesses (e.g., LIFO, Just-in-Time);
- RO3.05 – explain the importance of computer technology in inventory control.

#### Human Resources

- RO4.01 – describe the organizational structures (e.g., by product, by function) used in retail businesses;
- RO4.02 – compare a variety of job descriptions and job specifications for positions in a retail or service business;
- RO4.03 – describe methods of remuneration commonly used by retail and service businesses;
- RO4.04 – identify the essential skills and characteristics that an employer in a retail or service business values when considering a prospective employee (e.g., communication skills, self-motivating qualities).

#### New Trends in Marketing

- RO5.01 – identify current trends in the retail and service industries;
- RO5.02 – evaluate consumer and population trends that will likely affect retail and service businesses in the future;
- RO5.03 – describe ways in which changes in information technology (e.g., data mining, virtual malls) might influence markets, marketing techniques, and consumer buying habits in the future.

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## **Career Opportunities in Retail and Service Businesses**

### **Overall Expectations**

- COV.01 · determine strategies for effective career exploration in the retail and service sectors;
- COV.02 · evaluate the growth areas for future job opportunities in the retail and service industries;
- COV.03 · develop a personal marketing plan.

### **Specific Expectations**

#### **Career Exploration**

- CO1.01 – use computer software to investigate the range of careers in the retail and service sectors;
- CO1.02 – research positions available within various areas of the retail and service industries;
- CO1.03 – identify programs that provide opportunities for training within these employment sectors.

#### **Future Opportunities**

- CO2.01 – describe the skills, aptitudes, and attitudes needed for success in the retail and service industries;
- CO2.02 – evaluate their personal employability skills;
- CO2.03 – develop a personal growth plan to acquire the necessary skills and aptitudes.

#### **Personal Marketing**

- CO3.01 – describe methods of identifying employment opportunities (e.g., visiting job banks, reading the classified ads, networking, delivering résumés to local businesses, using student services);
- CO3.02 – describe key characteristics and skills needed to obtain employment (e.g., related to appearance, personality, aptitude, experience, initiative);
- CO3.03 – organize a personal portfolio that includes a résumé, a covering letter, and letters of recommendation;
- CO3.04 – develop appropriate job-interview techniques.

## Unit 1: Today's Retail Environment

**Time:** 27.25 hours

### Unit Description

Unit 1 functions as an introduction to the course and focuses on the importance of students' fundamental understanding of today's retail environment. Students develop a definition of retail marketing and look at the effect of globalization on product, on competition, and how products come from all over the world. Students research municipal, provincial, and federal regulations and may share the research. Students look at the environment and its interrelationship with the economic system.

**Strand(s):** The Marketing Process, Retail Systems and Operations, Career Opportunities in Retail and Service Businesses

### Unit Synopsis Char

Activity	Time	Expectations	Assessment	Tasks
1.1. Today's Retail and Marketing Environment	375 min	MPV.01, MPV.03, ROV.04, MP1.03, RS1.03, RS1.04, MP3.01, MP3.02, MP3.04, MP3.05, RO4.01	Knowledge/ Understanding Thinking/ Inquiry Communication Application	<ol style="list-style-type: none"> <li>1. Brainstorm major types of businesses in the retail and service sectors.</li> <li>2. Discuss types of businesses and direct competition.</li> <li>3. Develop organizational structures by product, by function and relate to competition.</li> <li>4. Plan to open a store.</li> <li>5. Investigate forms of ownership and franchise growth.</li> </ol>
1.2. Retail Marketing	225 min	MPV.01, MPV.03, MP1.01, MP1.02	Knowledge/ Understanding Thinking/ Inquiry Communication Application	<ol style="list-style-type: none"> <li>1. Develop a definition of retail marketing using concept webs.</li> <li>2. Build skills required for retail marketing.</li> <li>3. Brainstorm a basic rubric.</li> </ol>
1.3. Globalization	210 min	MPV.03, MPV.04, MP3.05, MP4.04	Knowledge/ Understanding Thinking/ Inquiry Communication Application	<ol style="list-style-type: none"> <li>1. Investigate the effect of globalization.</li> <li>2. Investigate products origins.</li> <li>3. Discover what happens when a major American retailer enters the Canadian market.</li> </ol>
1.4. Economic Systems	300 min	MPV.04, ROV.05, RSV.01, MP4.01, MP4.03, RO5.03	Knowledge/ Understanding Thinking/ Inquiry Communication	<ol style="list-style-type: none"> <li>1. Identify the characteristics of Canada's economic system.</li> <li>2. Research municipal, provincial and federal regulations.</li> <li>3. Discover the interrelationship between the environment and the economic system.</li> </ol>

1.5. Competition	300 min	MPV.01, MPV.03, ROV.04, ROV.05, MP1.03, MP3.01, MP3.02, MP3.03, MP3.04, RO4.01	Knowledge/ Understanding Thinking/ Inquiry Communication Application	<ol style="list-style-type: none"> <li>1. The culminating activity for the unit, a mall tour.</li> <li>2. Focus on safety rules</li> <li>3. Conduct a search for a virtual mall tour.</li> <li>4. Experience a real mall tour.</li> <li>5. Investigate concepts in retail marketing.</li> <li>6. Analyse the effects of competition</li> </ol>
1.6. Personal Portfolio	225 min	COV.03, CO3.03	Application	<p>The personal portfolio is an ongoing activity throughout the units.</p> <ol style="list-style-type: none"> <li>1. Revisit the information developed in the Grade 10 Career Studies course.</li> <li>2. Develop a personal fact sheet.</li> <li>3. Develop a personal resume.</li> </ol>

## Activity 1: Today's Retail Marketing Environment

**Time:** 375 minutes

### Description

This activity enables students' development of a fundamental understanding of today's retail environment by reflecting on their own shopping experiences. These introductory activities are used as the foundation for subsequent activities throughout the profile.

### Strand(s) & Learning Expectations

**Strand(s):** The Marketing Process, Elements of Retail and Services Marketing, Retail Systems and Operations

#### Overall Expectations

MPV.0 - evaluate the contribution of the retail and service industries to the marketing process;  
 RSV.01 - compare the retail marketing of a product with that of a service;  
 MPV.03 - identify and describe the factors that affect competition;  
 ROV.04 - describe the importance of the human resources function to retail and service businesses.

#### Specific Expectations

MP1.03 - describe the major types of business in the retail and service sectors;  
 RS1.03 - compare the various forms of business ownership available to retail and service businesses;  
 RS1.04 - explain the growth of franchise and chain store operations;  
 MP3.01 - identify retail or service businesses that compete directly with one another;  
 MP3.02 - demonstrate an understanding of how businesses compete with one another for customers;  
 MP3.04 - compare the strengths and weaknesses of the promotional activities of two different companies;  
 MP3.05 - describe the effects of globalization on competition;  
 RO4.01 - describe the organizational structures used in retail businesses.

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## Prior Knowledge & Skills

- Identification of retail businesses.
- Presentation software skills (Remedial exercises are available in BTT10/20, Introduction to Information Technology in Business, both Catholic and Public profiles. (See <http://www.curriculum.org.>))

## Planning Notes

- Teachers provide chart paper and markers.
- Contact a local Franchiser/Franchisee as a potential guest speaker.
- Copy Appendix 1.1 – Presentation Rubric for distribution.
- Preview videos (see Resources).

## Teaching/Learning Strategies

- In a large group activity, have students brainstorm examples of major types of businesses in the retail and services sector and list them on chart paper.
- Form groups of three to four and have students categorize the businesses by industry (e.g., fashion retailing, automotive, financial services) on chart paper.
- Students then brainstorm a list of businesses competing with the ones listed on the chart paper.
- Each group presents their findings while the remaining groups provide input to each other charts.
- The teacher begins a discussion on the two retail operations that commonly anchor a mall: the grocery store and the department store. The teacher discusses how these operations are organized by structure, by product, and by function and also encourages a discussion on the competition, within this framework.
- Use Appendix 1.1 – Presentation Rubric as a teaching tool to highlight the specific product expectations.
- Assign a small group activity, in which students plan to open a store in a local mall. They are to give the store type (e.g., pizza store, fitness centre) and a breakdown of the organizational structure, by product and by function. Each student produces a report in written or visual format (e.g., display board, electronic slide show presentation), followed by a presentation to the class.
- In the final segment of this activity, the teacher discusses and defines the different forms of organizations as well as franchising. Using think/pair/share, each group lists advantages and disadvantages for each on chart paper.
- Follow-up the previous exercise, by viewing videos listed in Resources. Assign the accompanying worksheets, for students to complete while viewing the video.
- Invite a guest speaker from a local franchise to discuss their reasons for entering into their business. They could also help identify advantages and disadvantages of franchising versus different forms of organizations.

## Assessment & Evaluation of Student Achievement

Involving students in the assessment process is one way to encourage learning. Group behaviours and specific roles assignments for groupings are outlined in Pedagogy Resources.

Focus: Knowledge/Understanding, Thinking/Inquiry, Application, Communication

Students should be given the assessment tools and rubric(s) to be used at the start of the activity.

- Self-Assessment of how students functioned within the group. (Formative)
- Teacher Evaluation of the presentation: Appendix 1.1 – Presentation Rubric (Note: Summative Evaluation must be individual and done by the teacher.)

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## **Accommodations**

The teacher should take into consideration the student's IEP for specific accommodations and suggestions that address the student's learning needs.

Extensive suggestions can be found in *The Curriculum Planner K-12*.

## **Enrichment**

Modify Opening a Store Activity by having students compare and contrast two competing retailers in terms of their organizational structures, by product and function.

## **Alternative Strategies**

- Modify Opening a Store Activity by having students simply create a poster or collage, which illustrates their understanding of the organizational structure, by product and function. This should be based on IEP needs.
- Students may require written notes or pre-taped presentations.
- Students may need to watch the video more than once.
- Provide a list of major North American businesses in the retail services sector and ask the student to list examples from his/her own country.

## **Resources**

*World of Business Video Series*. Unit 8, programs 2 and 3; Unit 1, program 4

## **Appendices**

Appendix 1.1 – Presentation Rubric

## **Activity 2: Retail Marketing**

**Time:** 225 minutes

### **Description**

This activity is designed to introduce students to retail terminology and its connection to marketing concepts. These introductory activities are also used as the foundation for subsequent activities throughout the profile.

### **Strand(s) & Learning Expectations**

**Strand(s):** The Marketing Process, Elements of Retail and Services Marketing, Retail Systems and Operations

### **Overall Expectations**

MPV.01 - evaluate the contribution of the retail and service industries to the marketing process;  
MPV.03 - identify and describe the factors that affect competition.

### **Specific Expectations**

MP1.01 - define retail marketing;  
MP1.02 - describe the skills that are important to effective retail selling.

### **Planning Notes**

- The teacher provides chart paper, markers, glue, scissors, magazines; or reminds students of the needed tools.

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## Teaching/Learning Strategies

Divide the class into four groups. Groups one and three develop a definition of retail marketing using semantic mapping/concept web/mind mapping or a Venn diagram on construction paper. Groups two and four do the same for a definition of marketing. (see Pedagogy Resources)

- Combine groups one and three and two and four respectively and have them share their Semantic Maps/Concept Web/Mind Map. Have them note similarities and differences.
- Have a representative from each group display their work and explain how their Map/Web was derived.
- Brainstorm the skills important to effective retail selling.
- In a large group exercise, synthesize the two Maps/Webs into one.
- Distribute Evaluation Rubric for Collage Activity.
- Individually, students create a collage, which illustrates their understanding of retailing.

## Assessment & Evaluation of Student Achievement

Focus: Knowledge/Understanding, Thinking/Inquiry, Application, Communication

- Group Assessment (see Forms found in Pedagogy Resources)
- Teacher Evaluation: Collage Rubric, Appendix 2.1
- Enrichment assessment: Appendices: 2.2 – Oral Report Rubric and Appendix 2.3 – Written Report Rubric

## Accommodations

### Enrichment

As an extension, students prepare a gap analysis using examples, discussing the differences and similarities between retail marketing and marketing. Student involvement in the product increases when given a choice. The product could be either a written or an oral report. See Appendix 2.2 – Oral Report Rubric and Appendix 2.3 – Written Report Rubric.

### Alternative Strategies

- Semantic mapping, concept webs, mind maps, or Venn diagrams can be simplified by using sticky notes so that information can be easily manipulated.

## Appendices

Appendix 2.1 – Collage Rubric

## Activity 3: Globalization

**Time:** 210 minutes

### Description

In this activity students develop an understanding of globalization and how it affects the Canadian economy. It forms a basis for working knowledge of market forces and introduces students to the reality of competition.

### Strand(s) & Learning Expectations

**Strand(s):** The Marketing Process

#### Overall Expectations

MPV.03 - identify and describe the factors that affect competition;

MPV.04 - summarize the influence of economic factors, government regulation, and globalization on the retail and service business environments.

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### **Specific Expectations**

MP3.05 - describe the effects of globalization on competition;

MP4.04 - relate increased globalization to changes in retail and service businesses in Canada.

### **Planning Notes**

- Preview videos and notes that accompany them.
- Preview materials with explanations and examples of Globalization in the Retail Market.
- Distribute Written Report Rubric to students prior to completing cases and assignment on globalization.

### **Teaching/Learning Strategies**

- Through a brainstorming exercise, students identify different characteristics of globalization (e.g., free trade, worldwide, import, export, etc.). Through these discussions, the teacher provides a definition of globalization.
- Individually, have students list what their typical day includes what they eat and what they wear. This leads into a discussion of the concept of international trade and how products come from all over the world. The terms import and export are defined.
- In pairs, have students pick a product with which they are familiar. They list the product, its competition, and analyse the cause and effect of globalization. Share findings with the class.
- One strategy is to show a video. Distribute the question sheet for students to complete while viewing the video. Discuss the video question sheet.
- Discuss with students a major American retailer and the effects of entering the Canadian Market. Case studies on this topic are found in texts in Resources.
- One strategy is show a video about International Trade (see Resources). Discuss whether Canada would do better by adopting the free trade policy.
- Using the video and discussions, students individually write a paragraph on how globalization affects Canada and its economy.

### **Assessment & Evaluation of Student Achievement**

Focus: Knowledge/Understanding, Thinking/Inquiry, Communication, Application

- Appendix 2.3 – Written Report Rubric, Appendix 1.2 – Collage Rubric

### **Accommodations**

#### **Enrichment**

Students include newspaper and/or magazine articles that reflect how globalization affects Canada and its economy.

#### **Alternative Strategies**

Students create a visual collage on how globalization affects Canada and its economy.

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## Activity 4: Economic Systems

**Time:** 300 minutes

### Description

Students identify the major components of the three basic economic systems and are able to describe the major characteristics of the Canadian economic system. By examining the Canadian economy, students discover how the rules/regulations govern all types of businesses. Students explore the interrelationships between the environment and the economic system and how this affects the marketing and service sectors.

### Strand(s) & Learning Expectations

**Strand(s):** The Marketing Process; Retail Systems and Operations

#### Overall Expectations

MPV.04 - summarize the influence of economic factors, government regulation, and globalization on the retail and service business environments;

ROV.05 - analyse current and emerging trends in retail and services marketing.

#### Specific Expectations

MP4.01 - identify the major characteristics of Canada's economic system;

MP4.03 - identify regulations made at the three levels of government that affect retail and service businesses;

RO5.03 - describe ways in which changes in information technology might influence markets, marketing techniques, and consumer buying habits in the future.

### Prior Knowledge & Skills

- Knowledge of Internet web browser use.

### Planning Notes

- Book a computer lab with Internet access prior to delivering this activity.
- Arrange contacts with local businesses if needed as an accommodation.
- Provide chart paper and markers.
- Supply a newspaper/magazine article concerning government regulation of business.
- The teacher supplies Appendix 1.1 – Presentation Rubric, Appendix 2.2 – Oral Report Rubric, and Appendix, 2.3 – Written Report Rubric.

### Teaching/Learning Strategies

- The teacher shares rubrics with the class at the beginning of the activity.
- The teacher should begin by defining the three basic economic systems. In small groups have students list the advantages and disadvantages of each economic system. The teacher records student responses and adds any missing points.
- In pairs, have students discuss which economic system Canada represents and why. Students share their findings. Through examples, the teacher demonstrates that Canada is a Mixed Economy.
- In pairs, students contact a local business and ask if and what government regulations/rules they are required to follow (e.g., Food and Drug Act, Health Department Regulations for fast food services/restaurants). They summarize and present their findings.
- In small groups, using the Internet, have students research municipal, provincial, and federal regulations. Students share their findings to ensure that each student has a comprehensive list.

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- The teacher supplies an article concerning government regulation of business (e.g., Municipal smoking by-laws; Provincial trucking safety regulations, etc.). Have students address the following issues. Identify the business activity the government is trying to regulate. What changes are required by the regulations? How will the changes impact on the business activity? List the advantages and disadvantages of the regulations. Explain your opinion on the issue supported with specific facts.
  - The teacher conducts a didactic lesson discussing the interrelationship between the environment and the economic system, and how it affects marketing. The teacher discusses and explains each environment, such as competition, political/legal, economic, technological, and socio-cultural.
  - The teacher posts five pieces of chart paper around the room labelled competition, political/legal, economic, technological, and socio-cultural. In groups of three, students think of examples of how each environmental issue affects marketing. The group presents its findings and is responsible for recording responses on the designated chart.
  - Students complete Marketing in Our Environment reports. The teacher supplies relevant newspaper and magazines. Review several issues of the newspapers for current articles on any of the factors given above. Prepare one report stating: a) what is happening in the news? (Choose a news article/advertisement and include in your assignment. b) What type of business might it affect and why? c) If this were your business, what would you do? (Whether the new is good/bad, how would you recover or take advantage of the situation?)

### **Assessment & Evaluation of Student Achievement**

Focus: Knowledge/Understanding, Thinking/Inquiry, Application, Communication

- Appendix 1.1 – Presentation Rubric, Appendix 2.2 – Oral Report Rubric, and Appendix 2.3 – Written Report Rubric.

### **Accommodations**

#### **Enrichment**

An excellent extension in the Government Regulation of Business assignment would be to have students provide an opinion report.

#### **Alternative Strategies**

- Have students compile a group of newspaper/magazine clippings regarding Government Regulations without writing the report.
- Supply arranged contacts with local businesses.

### **Appendices**

Appendix 1.1 – Presentation Rubric

Appendix 2.2 – Oral Report Rubric

Appendix 2.3 – Written Report Rubric

## **Activity 5: Competition**

**Time:** 300 minutes

### **Description**

Activity 5 is a culminating activity, a mall tour. Students e-search to a virtual mall tour. The activity expands to a real life mall tour. Students investigate how businesses compete with one another and analyse the effects of competition.

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## **Strand (s) & Learning Expectations**

**Strand(s):** The Marketing Process, Retail Systems and Operations

### **Overall Expectations**

- MPV.01 - evaluate the contribution of the retail and service industries to the marketing process;
- MPV.03 - identify and describe the factors that affect competition;
- MP1.02 - describe the skills that are important to effective retail selling;
- ROV.04 - describe the importance of the human resources function to retail and service businesses;
- ROV.05 - analyse current and emerging trends in retail and services marketing.

### **Specific Expectations**

- MP1.03 - describe the major types of business in the retail and service sectors;
- MP3.01 - identify retail or service businesses that compete directly with one another;
- MP3.02 - demonstrate an understanding of how businesses compete with one another for customers;
- MP3.03 - analyse the effects of competition on consumer and business behaviour;
- MP3.04 - compare the strengths and weaknesses of the promotional activities of two different companies;
- RO4.01 - describe the organizational structures used in retail businesses.

### **Prior Knowledge & Skills**

- E-search skills, remedial work is available from the BTT10/2O Course Profile at <http://www.curriculum.org>.

### **Planning Notes**

- Arrange computer lab time.
- Review e-search techniques.
- The teacher should visit the virtual mall tours available before students conduct the e-search.
- Review the school/board's Internet use agreement and on-line safety rules. Surf-Right at <http://www.tcdsb.on.ca> gives on-line safety tips and Internet etiquette tips.
- Review the school/board's trip policy and prepare the appropriate forms.

### **Teaching/Learning Strategies**

- Students e-search for a virtual mall tour and go on a virtual mall visit. They develop a chart of information discovered or write a report. The chart or report should include information on the following: The name of the shopping centre. Who designed the site? How many stores and shops in total? Are there vacant store(s) and the number? The tenancy options listed in the New Tenants information section of the site. Identify the merchants and the target market for each. Who the shoppers are. What type of consumers would best be served in a virtual mall? How does the mall ensure confidentiality to its customers? How are customers protected when making purchases from mall merchants? Who is responsible for mall maintenance?
- Traditional Mall Visit – This can be arranged as a class trip or assigned as homework. The trip as a homework assignment works well if students are given prior warning with a note explaining the exercise to their parents and a weekend to complete the assignment.
- Prepare students for the traditional mall tour with a discussion of appropriate behaviour and etiquette.

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- For the traditional mall visit students complete a chart then write a report that answers the following questions. Names of the shopping centre and Property Management Company. About how many stores and shops in total? Are there vacant stores? If yes, how many? Does the mall have carriages/wagons available for parents? Does the mall have wheelchairs available? Hours of operation? What department stores are in the mall? Compare three key products carried by the anchor stores. Compare the advertising methods and some of the ways these stores use to attract customers (e.g., window displays, promotions, signs).
  - Students compare and contrast their experiences at the traditional shopping centre with the experiences at the virtual mall by either designing a concept web, a Venn diagram, writing a report, or giving an oral presentation.

### **Assessment & Evaluation of Student Achievement**

- Students should be given the appropriate rubric based on the finished product they have chosen. Appendix 1.1 – Presentation Rubric, Appendix 2.2 – Oral Report Rubric, and Appendix 2.3 – Written Product Rubric

### **Accommodations**

#### **Enrichment**

- Design the perfect mall, either virtual or traditional.
- Conduct two virtual mall tours; compare the two malls based on the listed questions.

#### **Alternative Strategy**

- On the traditional mall visit, students collect promotional material offered by anchor stores.

## **Activity 6: Personal Portfolio**

**Time:** 225 minutes

### **Description**

Throughout the course, students develop a personal marketing plan. They build on the knowledge and skills developed in each unit. The portfolio includes an ongoing collection of samples of work that clearly demonstrates their growth, skills, and competencies and includes self-reflection on each piece of work included. The portfolio can be used for future opportunities in the education and/or employment fields.

### **Strand(s) & Learning Expectations**

**Strand(s):** Career Opportunities in Retail and Services Marketing, Retail Systems and Operations

#### **Overall Expectations**

COV.03 - develop a personal marketing plan.

#### **Specific Expectations**

CO3.03 - organize a personal portfolio that includes a résumé, a covering letter, and letters of recommendation.

### **Prior Knowledge & Skills**

- Word processing skills;
- Knowledge and Skills developed in the Grade 10 Career Education course, GLC20.

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## Planning Notes

- Provide students with a sample résumé and facts sheet.
- Book a computer lab.
- Obtain materials to create the physical portfolio (scissors, glue, markers, folders, etc.).
- Visit websites provided prior to introducing the topic of portfolios
- Arrange with a Guidance counsellor or the Career Studies teacher to review the portfolio developed in the Grade 10 (GLC2O) Career Studies course.
- Organize your personal portfolio to share with students or arrange with a staff member to share a portfolio as an exemplar.
- Arrange a speaker from a local employment centre to speak on the importance of portfolios in job interviews.

“Portfolios are collections of student work, but they not just any collection of student work. Portfolios have two major distinguishing characteristics. First, portfolios are collections of student work with a clear purpose that is known by students, parents and teachers. Second, a collection of student work is not a portfolio unless students have reflected in some way on each piece of work which is in the portfolio.” (p. 151, *Quality Assessment*)

Pp. 150-156 of OSSTF/FEESO *Quality Assessment* provide an excellent summary of portfolio use. It suggests a portfolio process: collect, select, reflect. It is a process that provides choices and is comfortable for students and teachers.

## Teaching/Learning Strategies

- Discuss the idea of collecting, organizing, and summarizing related items (e.g., coins, stamps, photographs). Ask students why people would collect these kinds of items. This should lead to a discussion on how a collection of work can be called a portfolio.
- Review the portfolio developed in GLC2O, Grade 10 Career Education course.
- Inspect and select products developed in Grade 10 to start their personal career portfolio. The portfolio item cover sheet found on p. 154 of *Quality Assessment* will assist this process.
- Demonstrate successful career portfolio use thorough speakers or examples.
- Address the difficulty immigrants and refugees face in finding employment, why this happens, and how portfolios can help.
- Using a personal portfolio as an exemplar, illustrate the type of documentation that should or could be included in it.
- Form groups of three to four and have students brainstorm advantages of creating their own portfolios and how this could help them in their personal and career growth.
- In a large group activity, summarize the suggestions made from each group.
- Distribute copies of the Appendix 6.1 – Portfolio Rubric, which will be used to evaluate the portfolio.
- Provide supplies for students to create their portfolio and personalize the cover.
- Discuss the importance of a résumé as a description of your qualifications.
- Discuss and illustrate the different types of resumes (chronological, functional).
- Provide students with sample résumés and have them decide which style best suits them.
- Have students begin their own personal résumés in draft form. In consultation with the teacher, students create a final copy of their resume. This should be the first item included in their portfolio.

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## Assessment & Evaluation of Student Achievement

- Informal peer assessment of the resume led by the teacher. It is important that the student has an opportunity to fine-tune the resume, after they have received the peer assessment, before the product is submitted to the teacher for marking.
- Self- and Peer Assessment using Appendix 6.1 – Portfolio Evaluation Rubric.

The teacher:

- evaluate résumés formally when completed.
- assesses student portfolios on an on-going basis throughout the course.
- provides anecdotal comments on samples of work contained in the portfolio.
- provides comments on strategies for improvement.

## Accommodations

### Enrichment

Students develop more than one style of résumé with consideration for appropriateness of each one.

### Alternative Strategies

- Arrange for students to receive individualized attention through the Learning Resource Personnel.
- Address the difficulty immigrants and refugees face in finding employment and why.

## Resources

See Pedagogy Resources and Career Resources in the Overview.

Clark, L., K. Zimmer, and J. Tinervia. *Business English and Communication*, 4th ed. Canada: McGraw-Hill Ryerson Ltd., 1990, pp. 604-612. ISBN 0-07-549857-X

E-Resume Writing - <http://www.eresumewriting.com/index2.html>

How Do I Write a Resume -<http://www.how-do-i-write-a-resume.com/index2.shtml>

Kretchman, L., D. Wagner and P. Lowens. *The Language of Business Communication*. Canada: John Wiley & Sons. 1988. pp. 322-328. ISBN 0-471-79677-8

Multiple Intelligences and Portfolios -<http://ericae.net/ericdb/ED416209.htm>

Portfolio Assessment – <http://www.eduplace.com/rdg/res/literacy/assess6.html>

7-Step Resume Sampler - <http://www.7step-resumesampler.com/tips.html#Résumé>

## Appendices

Appendix 6.1.1 – Portfolio Rubric

## Appendix 1.1

### Presentation Rubric

Criteria	Level 1 (50-59%)	Level 2 (60-69%)	Level 3 (70-79%)	Level 4 (80-100%)
<b>Knowledge/Understanding</b>				
Knowledge of facts and terms	- demonstrates limited knowledge of facts and terms	- demonstrates some knowledge of facts and terms	- demonstrates considerable knowledge of facts and terms	- demonstrates thorough insightful knowledge of facts and terms
Understanding of concepts, principles, and theories	- demonstrates limited ability to identify and explain content on topic	- demonstrates some ability to identify and explain content on topic	- demonstrates considerable ability to explain content on topic	- demonstrates through ability to explain all aspects of content on topic
<b>Thinking/Inquiry</b>				
Critical and creative thinking skills (e.g., to identify the problem, topic, issue, explore alternative, collect the data)	- demonstrates limited ability to use specific strategies to gather information and generate ideas for a presentation	- demonstrates some ability to use specific strategies to gather information and to generate ideas for a presentation	- demonstrates considerable ability to use specific strategies to gather information and to generate ideas for a presentation	- demonstrates considerable ability to use specific strategies to gather information and to generate ideas for a presentation
<b>Application</b>				
Application of concepts, skills, and procedures in familiar (to new) contexts	- demonstrates limited ability to use an organizational pattern to structure ideas for a presentation	- demonstrates some ability to use an organizational pattern to structure ideas for a presentation	- demonstrates considerable ability to use an organizational pattern to structure ideas for a presentation	- demonstrates a high degree of ability to use an organizational pattern to structure ideas for a presentation
Use of equipment, materials and technology	- demonstrates limited ability to use strategies for style, text, background, timing or transitions	- demonstrates limited ability to use strategies for style, text, background, timing or transitions	- demonstrates limited ability to use strategies for style, text, background, timing or transitions	- demonstrates limited ability to use strategies for style, text, background, timing or transitions

**Note:** A student whose achievement is below level 1 (50%) has not met the expectations for this assignment or activity.

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## Appendix 2.1

### Collage Rubric

Criteria	Level 1 (50-59%)	Level 2 (60-69%)	Level 3 (70-79%)	Level 4 (80-100%)
<b>Thinking/Inquiry</b>				
Critical and creative thinking skills	- demonstrates limited evidence of knowledge and originality	- demonstrates some evidence of knowledge and originality	- demonstrates considerable evidence of knowledge and originality	- demonstrates outstanding knowledge and originality
<b>Communication</b>				
Communication of information and idea through visuals	- demonstrates limited awareness of instructions	- demonstrates some awareness of instructions	- demonstrates considerable awareness of instructions	- demonstrates a high degree of awareness of instructions
<b>Application</b>				
Transfer of concepts, skills and procedures to new contexts	- demonstrates limited effectiveness of the collage	- demonstrates some effectiveness of the collage	- demonstrates considerable effectiveness the collage	- demonstrates a high degree of effectiveness of the collage

**Note:** A student whose achievement is below level 1 (50%) has not met the expectations for this assignment or activity.

## Appendix 2.2

### Oral Report Rubric

Criteria	Level 1 (50-50%)	Level 2 (60-69%)	Level 3 (70-79%)	Level 4 (80-100%)
<b>Knowledge/Understanding</b>				
Knowledge of facts and terms	- demonstrates limited knowledge of facts and terms	- demonstrates some knowledge of facts and terms	- demonstrates considerable knowledge of facts and terms	- demonstrates thorough knowledge of facts and terms
<b>Communication</b>				
Use of language, symbols, visuals	- demonstrates limited ability to use vocabulary and language conventions to speak clearly and correctly	- demonstrates some ability to use vocabulary and language conventions to speak clearly and correctly	- demonstrates considerable ability to use vocabulary and language conventions to speak clearly and correctly	- demonstrates a high degree of ability to use vocabulary and language conventions to speak clearly and correctly
Communication for different audiences and purposes	- demonstrates limited ability to use strategies for effective business communication	- demonstrates some ability to use strategies for effective business communication	- demonstrates considerable ability to use strategies for effective business communication	- demonstrates a high degree of ability to use strategies for effective business communication
Communication of information and ideas	- demonstrates limited ability to communicate information and ideas with clarity	- demonstrates some ability to communicate information and ideas with clarity	- demonstrates considerable ability to communicate information and ideas with limited clarity	- demonstrates a high degree of ability to communicate information and ideas with clarity

**Note:** A student whose achievement is below level 1 (50%) has not met the expectations for this assignment or activity.

## Appendix 2.3

### Written Report Rubric

Criteria	Level 1 (50-59%)	Level 2 (60-69%)	Level 3 (70-79%)	Level 4 (80-100%)
<b>Knowledge/Understanding</b>				
Understanding of concepts, principles and theories  Key concepts/ principles/ theories related to the expectation:	- demonstrates limited understanding of the key concepts, principles and theories	- demonstrates some understanding of the key concepts, principles and theories	- demonstrates considerable understanding of the key concepts, principles and theories	- demonstrates a through and insightful understanding of the key concepts, principles and theories
<b>Thinking/Inquiry</b>				
Inquiry skills	- demonstrates limited ability to use specific strategies to gather information and generate ideas for a written report	- demonstrates limited ability to use specific strategies to gather information and generate ideas for a written report	- demonstrates limited ability to use specific strategies to gather information and generate ideas for a written report	- demonstrates limited ability to use specific strategies to gather information and generate ideas for a written report
<b>Communication</b>				
Communication of information and ideas	- demonstrates limited ability to use language conventions to write correctly	- demonstrates some ability to use language conventions to write correctly	- demonstrates considerable ability to use language conventions to write correctly	- demonstrates a high degree of ability to use language conventions to write correctly

**Note:** A student whose achievement is below level 1 (50%) has not met the expectations for this assignment or activity.

## Appendix 6.1.1

### Portfolio Rubric

Criteria	Level 1 (50-59%)	Level 2 (60-69%)	Level 3 (70-79%)	Level 4 (80-100%)
<b>Application</b>				
Making connections	- demonstrates limited ability to use an organizational pattern to structure the portfolio	- demonstrates some ability to use an organizational pattern to structure the portfolio	- demonstrates considerable ability to use an organizational pattern to structure the portfolio	- demonstrates a high degree of ability to use an organizational pattern to structure the portfolio
<b>Thinking/Inquiry</b>				
Inquiry skills (e.g., planning, selecting, analysing and interpreting) (e.g., career plan)	- demonstrates limited ability to use creative, perceptive or insightful strategies to gather portfolio information	- demonstrates limited ability to use creative, perceptive or insightful strategies to gather portfolio information	- demonstrates limited ability to use creative, perceptive or insightful strategies to gather portfolio information	- demonstrates limited ability to use creative, perceptive or insightful strategies to gather portfolio information
<b>Knowledge/Understanding</b>				
Understanding of relationships between concepts and ideas	- demonstrates limited ability to use strategies for self reflection	- demonstrates some ability to use strategies for self reflection	- demonstrates considerable ability to use strategies for self reflection	- demonstrates a high degree of ability to use strategies for self reflection

**Note:** A student whose achievement is below level 1 (50%) has not met the expectations for this assignment or activity.