

Course Outline

Business and Finance

REVISED: August/2023

Job Title

Office Technician

75-35-55

Career Pathway:

Business Management

Office Technician/1: Fundamentals

Industry Sector:

Business and Finance

Credits: 10

Hours: 135

O*NET-SOC CODE:

43-9061.00

Course Description:

This competency-based course is the first in a sequence of three designed for office technician training. It provides students with technical instruction and practical experience in office procedures. It includes an orientation, safety and ergonomics, telephone techniques, email, mail, office tools and equipment, data verification/proofreading, records management, reference materials, travel arrangements, grammar, spelling and vocabulary, punctuation, business letter and report writing, reading, listening and speaking skills, and employability skills and resume preparation. The competencies in this course are aligned with the California High School Academic Content Standards and the California Career Technical Education Model Curriculum Standards.

CBEDS Title:

Business Management

Prerequisites:

Successful completion of Typist: Keyboarding (71-50-88) course.

CBEDS No.:

4637

NOTE: For Perkins purposes this course has been designated as a **introductory** course.

This course **cannot** be repeated once a student receives a Certificate of Completion.



COURSE OUTLINE COMPETENCY-BASED COMPONENTS

A course outline reflects the essential intent and content of the course described. Acceptable course outlines have six components. (Education Code Section 52506). Course outlines for all apportionment classes, including those in jails, state hospitals, and convalescent hospitals, contain the six required elements:

(EC 52504; 5CCR 10508 [b]; Adult Education Handbook for California [1977], Section 100)

COURSE OUTLINE COMPONENTS

LOCATION

GOALS AND PURPOSES

Cover

The educational goals or purposes of every course are clearly stated, and the class periods are devoted to instruction. The course should be broad enough in scope and should have sufficient educational worth to justify the expenditure of public funds.

The goals and purpose of a course are stated in the COURSE DESCRIPTION. Course descriptions state the major emphasis and content of a course and are written to be understandable by a prospective student.

PERFORMANCE OBJECTIVES OR COMPETENCIES

pp. 7-17

Objectives should be delineated and described in terms of measurable results for the student and include the possible ways in which the objectives contribute to the student's acquisition of skills and competencies.

Performance Objectives are sequentially listed in the COMPETENCY-BASED COMPONENTS section of the course outline. Competency Areas are units of instruction based on related competencies. Competency Statements are competency area goals that together define the framework and purpose of a course. Competencies fall on a continuum between goals and performance objectives and denote the outcome of instruction.

Competency-based instruction tells a student before instruction what skills or knowledge they will demonstrate after instruction. Competency-based education provides instruction which enables each student to attain individual goals as measured against pre-stated standards.

Competency-based instruction provides immediate and continual repetition and in competency-based education the curriculum, instruction, and assessment share common characteristics based on clearly stated competencies. Curriculum, instruction, and assessment in competency-based education are explicit, known, agreed upon, integrated, performance oriented, and adaptive.

COURSE OUTLINE COMPETENCY-BASED COMPONENTS
(continued)

COURSE OUTLINE COMPONENTS	LOCATION
INSTRUCTIONAL STRATEGIES	p. 19
<p>Instructional techniques or methods could include laboratory techniques, lecture methods, small-group discussion, grouping plans, and other strategies used in the classroom.</p> <p>Instructional strategies for this course are listed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructional strategies and activities for a course should be selected so that the overall teaching approach considers the instructional standards of a particular program, i.e., English as a Second Language, Programs for Adults with Disabilities.</p>	
UNITS OF STUDY, WITH APPROXIMATE HOURS ALLOTTED FOR EACH UNIT	Cover
<p>The approximate time devoted to each instructional unit on the course, as well as the total hours for the course, is indicated. The time in class is consistent with the needs of the student, and the length of the class should be so that it ensures the student will learn at an optimum level.</p> <p>Units of study, with approximate hours allotted for each unit are listed in the COMPETENCY AREA STATEMENT(S) of the course outline. The total hours of the course, including work-based learning hours (community classroom and cooperative vocational education) are listed on the cover of every CBE course outline. Each Competency Area listed within a CBE outline is assigned hours of instruction per unit.</p>	
EVALUATION PROCEDURES	pp. 19
<p>The evaluation describes measurable evaluation criteria clearly within the reach of the student. The evaluation indicates anticipated improvement in performance as well as anticipated skills and competencies to be achieved.</p> <p>Evaluation procedures are detailed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructors monitor students' progress on a continuing basis, assessing students on attainment of objectives identified in the course outline through a variety of formal and informal tests (applied performance procedures, observations, and simulations), paper and pencil exams, and standardized tests.</p>	
REPETITION POLICY THAT PREVENTS PERPETUATION OF STUDENT ENROLLMENT	Cover
<p>After a student has completed all the objectives of the course, he or she should not be allowed to reenroll in the course. There is, therefore, a need for a statement about the conditions for possible repetition of a course to prevent perpetuation of students in a particular program for an indefinite period of time.</p>	

ACKNOWLEDGMENTS

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CALIFORNIA CAREER TECHNICAL EDUCATION MODEL CURRICULUM STANDARDS

Business and Finance Industry Sector Knowledge and Performance Anchor Standards

1.0 Academics

Analyze and apply appropriate academic standards required for successful industry sector pathway completion leading to postsecondary education and employment. Refer to the Business and Finance academic alignment matrix for identification of standards.

2.0 Communications

Acquire and accurately use Business and Finance sector terminology and protocols at the career and college readiness level for communicating effectively in oral, written, and multimedia formats.

3.0 Career Planning and Management

Integrate multiple sources of career information from diverse formats to make informed career decisions, solve problems, and manage personal career plans.

4.0 Technology

Use existing and emerging technology to investigate, research, and produce products and services, including new information, as required in the Business and Finance sector workplace environment.

5.0 Problem Solving and Critical Thinking

Conduct short, as well as more sustained, research to create alternative solutions to answer a question or solve a problem unique to the Business and Finance sector using critical and creative thinking, logical reasoning, analysis, inquiry, and problem-solving techniques.

6.0 Health and Safety

Demonstrate health and safety procedures, regulations, and personal health practices and determine the meaning of symbols, key terms, and domain-specific words and phrases as related to the Business and Finance sector workplace environment.

7.0 Responsibility and Flexibility

Initiate, and participate in, a range of collaborations demonstrating behaviors that reflect personal and professional responsibility, flexibility, and respect in the Business and Finance sector workplace environment and community settings.

8.0 Ethics and Legal Responsibilities

Practice professional, ethical, and legal behavior, responding thoughtfully to diverse perspectives and resolving contradictions, when possible, consistent with applicable laws, regulations, and organizational norms.

9.0 Leadership and Teamwork

Work with peers to promote divergent and creative perspectives, effective leadership, group dynamics, team and individual decision making, benefits of workforce diversity, and conflict resolution as practiced in the Future Business Leaders of America (FBLA) career technical student organization.

10.0 Technical Knowledge and Skills

Apply essential technical knowledge and skills common to all pathways in the Business and Finance sector, following procedures when carrying out experiments or performing technical tasks.

11.0 Demonstration and Application

Demonstrate and apply the knowledge and skills contained in the Business and Finance anchor standards, pathway standards, and performance indicators in classroom, laboratory, and workplace settings, and through the Future Business Leaders of America (FBLA) career technical student organization.

Business and Finance Pathway Standards

A. Business Management Pathway

Management consists of planning, leading, and controlling an organization or effort to accomplish a goal. In the Business Management pathway, students learn entrepreneurship and business fundamentals, goal setting, resource allocation, organizational structure and management techniques, economics, financial data, risk management, information technology, and supply chain management.

Sample occupations associated with this pathway:

- ◆ Human Resources Specialist
- ◆ Education Administrator
- ◆ Purchasing Agent
- ◆ Office Manager
- ◆ Chief Financial Officer

- A1.0 Explain entrepreneurship and the fundamentals of developing a new business.
- A2.0 Plan, organize, secure, and manage resources of a project to achieve specific goals.
- A3.0 Investigate the functions and techniques of management and organizational structure and distinguish between small and large companies.
- A4.0 Apply economic concepts as they relate to business.
- A5.0 Analyze financial data to make short-term and long-term decisions.
- A6.0 Explain the importance of risk management and regulatory compliance in business.
- A7.0 Utilize information and technology tools to conduct business effectively and efficiently.
- A8.0 Construct a Marketing Plan.

CBE
Competency-Based Education

COMPETENCY-BASED COMPONENTS
for the Office Technician/1: Fundamentals Course

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>A. INTRODUCTION</p> <p>Identify skills required, equipment and materials used, classroom procedures, and available job opportunities for an office technician.</p> <p>(2 hours)</p>	<ol style="list-style-type: none"> 1. Describe the scope and purpose of the course. 2. Describe classroom policies and procedures. 3. Describe the importance of prioritizing work. 4. Discuss and identify the different career paths, occupations, employment outlook, career advancements, and its impact on the administrative assistant and/or office technician. 5. Discuss the opportunities available for promoting gender equity and the representation of non-traditional populations. 6. Explain and recognize the importance of ethical behavior, teamwork, respecting individual and cultural differences and diversity in the workplace. 7. Describe the duties and job roles as they apply to the Business and Finance industry sector. 	<p>Career Ready Practice: 1, 2, 3, 8, 9</p> <p>CTE Anchor: Academics: 1.0 Communication: 2.1 Career Planning and Management: 3.1, 3.3, 3.5, 3.9 Ethics and Legal Responsibilities: 8.4 Leadership and Teamwork: 9.6</p> <p>CTE Pathway: A4.2</p>
<p>B. SAFETY AND ERGONOMICS</p> <p>Review, understand, apply, and demonstrate the principles of safety and ergonomics.</p>	<ol style="list-style-type: none"> 1. Identify and explain classroom and workplace first aid and emergency procedures. 2. Discuss, and research the California Occupational Safety and Health Administration (Cal/OSHA) workplace requirements. 3. Discuss how each of the following ensures a safe workplace to include verbal and nonverbal communication: <ol style="list-style-type: none"> a. employees’ rights as they apply to job safety b. employees’ obligations as they apply to safety c. safety laws applying to tools and equipment 4. Demonstrate operating a computer safely and in a manner that protects the equipment. 5. Define ergonomics and demonstrate sound ergonomic practices such as: <ol style="list-style-type: none"> a. identify causes, effects, and preventive measures for repetitive strain injuries 	<p>Career Ready Practice: 1, 2, 4, 5, 8, 10, 11, 12</p> <p>CTE Anchor: Academics: 1.0 Communication: 2.1, 2.3, 2.6 Technology: 4.4, 4.5 Problem Solving and Critical Thinking: 5.1, 5.4</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(3 hours)	<ul style="list-style-type: none"> b. typing technique, posture, and finger placement c. keyboard and monitor angle d. ways to hold and move a mouse without gripping it hard or squeezing it e. list benefits of periodic breaks to stretch and relax f. variety of stretches involving the wrists, neck, and shoulders g. organizing one's workspace. <ul style="list-style-type: none"> 6. Discuss software copyright laws as they pertain to computers. 7. Explain and sign LAUSD Responsible Use Policy (RUP). 8. Pass the safety test with 100% accuracy. 	<p>Health and Safety: 6.2, 6.3, 6.4, 6.5, 6.6, 6.7</p> <p>Ethics and Legal Responsibilities: 8.4, 8.6, 8.7</p> <p>Technical Knowledge and Skills: 10.2</p> <p>Demonstrate and Application: 11.1</p> <p>CTE Pathway: A6.1, A7.1, A7.4</p>
<p>C. TELEPHONE TECHNIQUES</p> <p>Understand, apply, and evaluate the procedures for handling telephone communications and identifying commonly used business equipment and services.</p>	<ul style="list-style-type: none"> 1. Identify and describe the features and functions of the telephone equipment used in the industry. 2. Explain the answering services at the workplace and how they play a role after hours. 3. Describe the features and functions of the following types of calls: <ul style="list-style-type: none"> a. local b. long distance c. emergency d. conference 4. Describe the functions of the following phone service features and etiquette: <ul style="list-style-type: none"> a. call waiting/forwarding b. three-way conference calling c. memory feature d. speed dialing e. voice mail message f. caller ID g. call center 5. Explain the use of personal cell phone requirements at workplace to include inappropriate use. 6. Explain the importance of frequently used phone numbers to include phone extension(s). 7. Describe and demonstrate the proper use of Internet search to include white and yellow pages. 8. Describe the importance of placing and answering calls mindful of the following: <ul style="list-style-type: none"> a. area codes b. time zones c. application of company policies regarding telephone techniques d. prepared notes on routine inquiries e. prepared responses to routine telephone inquiries 	<p>Career Ready Practice: 1, 2, 5, 10</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2 Problem Solving and Critical Thinking: 5.1, 5.2, 5.4 Demonstration and Application: 11.1</p> <p>CTE Pathways: A7.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(6 hours)	<ol style="list-style-type: none"> 9. Describe and demonstrate telephone etiquette pertaining to the following: <ol style="list-style-type: none"> a. answering calls promptly and courteously b. identifying the company, department, and self on the phone c. distinct enunciations and pronunciations for good voice personality d. screening, placing on hold, or transferring telephone calls e. proper techniques for writing telephone messages f. remaining calm when all lines are constantly ringing and/or many calls are on hold g. resolving telephone related client complaints h. interpret information and draw conclusions, based on the best analysis, to make informed decisions i. handling calls from people with speech problems j. delivering message to the proper person k. leaving message with another person l. closing a call 10. Pass a telephone techniques assessment with an 80% score or higher. 	
<p>D. E-MAIL</p> <p>Understand, apply, and evaluate the procedures for handling e-mail.</p>	<ol style="list-style-type: none"> 1. Define and introduce basic parts of an electronic mail (e-mail). 2. Explain and demonstrate how to set up an e-mail <ol style="list-style-type: none"> a. parts of an e-mail address b. navigation bar options c. open an e-mail d. difference between company email and personal email 3. Composing and Sending E-mail Messages <ol style="list-style-type: none"> a. compose e-mail messages b. e-mail etiquette/netiquette c. send an e-mail message 4. Working with Incoming Messages <ol style="list-style-type: none"> a. view an e-mail message in the reading pane b. explain unknown e-mails, attachments, links, spam, junk, phishing, etc. c. preview and open an attachment d. save an attachment e. print an e-mail message 5. Responding to Messages <ol style="list-style-type: none"> a. reply to an e-mail message b. reply vs. reply all c. spell check and grammar d. save and close an e-mail message e. attach a file to an e-mail message f. define and forward an e-mail message 6. Organizing Messages using Folders <ol style="list-style-type: none"> a. delete an e-mail message b. describe and demonstrate how to work within the mailbox 7. Online Calendar, Appointments, and Meetings Calendars: <ol style="list-style-type: none"> a. use the online calendar 	<p>Career Ready Practice: 1, 2, 4, 8, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.4, 2.6 Technology: 4.1 Ethics and Legal Responsibilities: 8.4 Technical Knowledge and Skills: 10.1 Demonstration and Application: 11.1</p> <p>CTE Pathways: A7.2</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(6 hours)	<ul style="list-style-type: none"> b. calendar window c. navigate the calendar d. go to a specific date e. create and edit appointments/meetings f. create appointments/meetings using the appointment window g. save and delete an appointment/meeting h. posting personal events on company calendar <p>8. Pass an e-mail assessment with an 80% score or higher.</p>	
<p>E. MAIL</p> <p>Understand, apply, and evaluate the procedures for mail shipping and distribution.</p> <p>(2 hours)</p>	<ul style="list-style-type: none"> 1. Describe and demonstrate the procedures for opening, sorting, and distributing office incoming mail. 2. Identify which postal services are needed when preparing outgoing mail. 3. Describe and demonstrate the use of a parcel post chart(s). 4. Define common shipping terms, rates, and services. 5. Describe and demonstrate proper shipping labels and forms. 6. Demonstrate, verify, and describe the importance of proofreading street address, city, zip code on shipping label(s) using reference materials or online search tools. 7. Use reference materials to compare and interpret the cost of service(s). 8. Describe and demonstrate proper procedures for addressing and posting envelopes. 9. Pass a mail assessment with an 80% score or higher. 	<p>Career Ready Practice: 1, 2, 4, 5, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.4, 2.5 Technology: 4.1, 4.3 Problem Solving and Critical Thinking: 5.4 Technical Knowledge and Skills: 10.1, 10.2 Demonstration and Application: 11.1</p> <p>CTE Pathways: A7.1, A7.2, A7.4</p>
<p>F. OFFICE TOOLS AND EQUIPMENT</p> <p>Understand, apply, and evaluate the procedures for using the various office tools and equipment.</p>	<ul style="list-style-type: none"> 1. Define, demonstrate, and operate the safe use and maintenance of the following office tools, equipment, and peripherals, such as: <ul style="list-style-type: none"> a. computer b. laptop c. tablets d. backup devices e. telephone f. copy/fax/scanner/printer machine g. electric sharpener h. electric stapler i. paper cutter j. laminating machine 	<p>Career Ready Practice: 1, 2, 10</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3 Health and Safety: 6.3</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(1 hour)	2. Pass an office tools and equipment assessment with an 80% score or higher.	Technical Knowledge and Skills: 10.1 Demonstration and Application: 11.1 CTE Pathways: A7.1
G. DATA VERIFICATION/ PROOFREADING Understand, apply, and evaluate the procedures for sorting and verifying data.	1. Read and analyze incoming memos, letters, financial statements, and other documents by using word processing, spreadsheet, database, or presentation software. 2. Demonstrate inputting data using various forms such as: labels, work orders, telephone messages, etc. 3. Transfer data from a document to a form and verify accuracy. 4. Verify list of documents and compare with the source, printed, or handwritten document(s). 5. Describe sorting business documents into subgroups of similar data to prioritize based on deadline(s). 6. Verify calculations and compare against a handwritten list of figures. 7. Discuss the importance of safeguarding data. 8. Pass a data verification assessment with an 80% score or higher.	Career Ready Practice: 1, 2, 4, 5, 10 CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3 Technology: 4.1, 4.3 Problem Solving and Critical Thinking: 5.1, 5.4 Technical Knowledge and Skills: 10.5 Demonstration and Application: 11.1 CTE Pathways: A7.1, A7.2
H. RECORDS MANAGEMENT Understand, apply, and evaluate data management procedures.	1. Define and identify the following: a. alphabetic filing b. numeric filing c. geographic filing d. subject/category filing e. chronologic filing 2. Identify the different types of records: medical, court, school transcripts, employee records, etc. 3. Explain the importance of uploading documents and audit for clarity, accurateness, presentability, and completeness. 4. Describe and identify indexing rules.	Career Ready Practice: 1, 2, 4, 5, 7, 10 CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, Technology: 4.1, 4.2, 4.3

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(15 hours)	<ol style="list-style-type: none"> 5. Describe and demonstrate the following: <ol style="list-style-type: none"> a. inspection of document for release b. selection of name, subject, or caption for filing c. compare and contrast information to determine need for cross-referencing d. interpret sorting of documents and draw conclusions to make informed decisions e. arranging incoming and outgoing correspondence f. preparing individual folders for use g. making folder labels h. arranging guides and folders 6. Explain, identify, and demonstrate the elements of the <ol style="list-style-type: none"> a. alphabetic system: double letters, hyphenated letters, etc. b. numeric system: account numbers, zip codes, file numbers, etc. c. geographic filing: cities, states, regions, continents, etc. 7. Describe and demonstrate the following: <ol style="list-style-type: none"> a. filing by location b. filing by subject c. identifying primary and secondary headings d. coding and sorting subject files 8. Describe the importance of being careful about details and thorough in completing records management tasks. 9. Describe and demonstrate the following to include hard copy and electronic versions: <ol style="list-style-type: none"> a. managing and maintaining invoices, reports, memos, letters, financial statements, and other documents using word processing, spreadsheet, database, and/or presentation software b. filing, retrieving, corporate documents, records, and reports c. ordering supplies, performing basic bookkeeping work d. preparing agendas and planning for committee, board, and other meetings 10. Pass a records management assessment (i.e., file via alphabetic, numeric, subject/category, and geographic system) with an 80% score or higher. 	<p>Problem solving and Critical Thinking: 5.1, 5.2, 5.4 Responsibility and Flexibility: 7.4 Technical Knowledge and Skills: 10.1, 10.2 Demonstration and Application: 11.1</p> <p>CTE Pathways: A7.1, A7.2</p>
<p>I. REFERENCE MATERIALS</p> <p>Understand, apply, and evaluate the procedures for using office reference materials.</p>	<ol style="list-style-type: none"> 1. Identify and describe the features and functions of the following reference materials: <ol style="list-style-type: none"> a. dictionary b. thesaurus c. reference manual/guides such as: <ol style="list-style-type: none"> i. Gregg Reference Manual ii. Secretarial Handbook iii. street guidebook iv. maps v. employee handbook vi. company procedure manual vii. instructional manual 	<p>Career Ready Practice: 1, 2, 4</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3 Technology: 4.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(4 hours)	<ul style="list-style-type: none"> viii. mandated materials/trainings 2. Incorporate data/information from the reference materials in the following: <ul style="list-style-type: none"> a. report b. memo c. letter d. invoice e. financial statement f. PowerPoint presentation 3. Use internet search engines as a tool to search reference materials online. 4. Pass a reference materials assessment with an 80% score or higher. 	<p>Technical Knowledge and Skills: 10.1, 10.3</p> <p>CTE Pathways: A7.1, A7.2, A7.4</p>
<p>J. TRAVEL ARRANGEMENTS</p> <p>Understand, apply, and evaluate the procedures for documenting business travel arrangements by car, air.</p> <p>(4 hours)</p>	<ul style="list-style-type: none"> 1. Define business travel. 2. Describe the coordination of travel arrangements via the internet and travel agents. 3. Describe and demonstrate the following: <ul style="list-style-type: none"> a. compare and contrast selection of means of travel via ground transportation b. scheduling of meetings and appointments c. arranging hotel accommodations d. preparing an itinerary for a week of travel including Global Positioning System (GPS) directions to travel location(s). e. managing and maintaining an executive travel schedule 4. Prepare travel folders with the following documents: <ul style="list-style-type: none"> a. transportation reservation confirmations b. meeting schedules c. hotel accommodation confirmations d. daily/weekly itineraries e. receipts including mileage f. phone/fax messages 5. Explain and demonstrate submitting travel expenditures for reimbursement. 6. Demonstrate elements of written and electronic communication such as accuracy, spelling, grammar, and format. 7. Pass a travel arrangements assessment with an 80% score or higher. 	<p>Career Ready Practice: 1, 2, 4, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.4, 2.5 Technology: 4.1, 4.3 Technical Knowledge and Skills: 10.1, 10.3, 10.5 Demonstration and Application: 11.1</p> <p>CTE Pathways: A7.1, A7.2, A7.4</p>
<p>K. GRAMMAR</p> <p>Understand, apply, and evaluate the rules of grammar.</p>	<ul style="list-style-type: none"> 1. Define the following: <ul style="list-style-type: none"> a. sentence b. fragments c. run-on sentences d. phrases 2. Describe and demonstrate the use of the following types of sentences: <ul style="list-style-type: none"> a. declarative b. interrogative 	<p>Career Ready Practice: 1, 2, 10, 12</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.4</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(25 hours)	<ul style="list-style-type: none"> c. imperative 3. Describe and demonstrate the use of the following eight parts of speech using English reference materials: <ul style="list-style-type: none"> a. nouns b. pronouns c. verbs d. adjectives e. adverbs f. prepositions g. conjunctions h. interjections 4. Describe and demonstrate the use of the different types of subjects. 5. Identify and demonstrate the use of the two types of clauses: <ul style="list-style-type: none"> a. independent b. dependent 6. Describe and demonstrate the use of the following phrases: <ul style="list-style-type: none"> a. prepositional b. infinitive c. verb 7. Describe and demonstrate the use of subject/verb agreement. 8. Compose three business paragraphs using the following: <ul style="list-style-type: none"> a. eight parts of speech b. three types of sentences c. independent and dependent clauses d. verb tense 9. Pass a grammar assessment with an 80% score or higher. 	<p>Technical Knowledge and Skills: 10.1, 10.2, 10.3 Demonstration and Application: 11.1</p> <p>CTE Pathway: A7.1, A7.2</p>
<p>L. SPELLING AND VOCABULARY</p> <p>Understand, apply, and evaluate the rules of spelling.</p>	<ul style="list-style-type: none"> 1. Explain and apply basic spelling rules. 2. Define the following: <ul style="list-style-type: none"> a. homonyms b. synonyms c. antonyms 3. Review and demonstrate the use of the following reference materials: <ul style="list-style-type: none"> a. dictionary b. thesaurus c. secretarial handbook d. word division book for writing e. reference guides f. instructional manuals g. company procedure manual h. internet 4. Write definitions of twenty-five business vocabulary words found in a dictionary and use in sentences. 5. Write fifteen sentences using correct spelling and business vocabulary and pass oral and written spelling tests. 6. Compose three business paragraphs using diverse types of reasoning (inductive, deductive) for the following: 	<p>Career Ready Practice: 1, 2, 4, 5, 10</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.4 Technology: 4.1 Problem Solving and Critical Thinking: 5.2 Technical Knowledge and Skills: 10.1, 10.2 Demonstration and Application: 11.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(12 hours)	<ul style="list-style-type: none"> a. homonyms b. synonyms c. antonyms 7. Pass a spelling and vocabulary assessment with an 80% score or higher.	CTE Pathway: A7.1, A7.2
M. PUNCTUATION Understand, apply, and evaluate the rules of punctuation.	1. Identify and describe the functions of the following punctuation marks: <ul style="list-style-type: none"> a. period b. question mark c. exclamation point d. comma e. parentheses f. quotation mark g. apostrophes h. colon i. semicolon j. dash k. hyphen l. underscore or italics 2. Describe the punctuation rules. 3. Write sentences using the punctuation marks discussed. 4. Describe and use the rules of capitalization. 5. Describe and use: abbreviations, acronyms, symbols, and numbers in written communications. 6. Compose three business paragraphs using the following: <ul style="list-style-type: none"> a. at least five punctuation marks b. at least three abbreviations c. at least three acronyms d. at least three symbols e. rules of capitalization 7. Pass a punctuation assessment with an 80% score or higher.	Career Ready Practice: 1, 2, 4 CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.4 Technology: 4.1, 4.2 Technical Knowledge and Skills: 10.2 CTE Pathway: A7.1, A7.2
N. BUSINESS LETTER AND REPORT WRITING Understand, apply, and evaluate the rules of business letter and report writing.	1. Identify the following parts of a business letter: <ul style="list-style-type: none"> a. heading/return address b. date c. recipient's/inside address d. subject/attention line e. greeting/salutation f. body of the letter g. closing h. signature and signature line i. typist/reference initials j. courtesy copy (formerly known as carbon copy) k. enclosures/attachments 2. Describe writing effective sentences and joining them into paragraphs to convey proper tone.	Career Ready Practice: 1, 2, 4, 10 CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.4 Technology: 4.2 Demonstration and Application: 11.1

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(25 hours)	<ol style="list-style-type: none"> 3. Describe the components of a clear, complete, and concise business letter. 4. Identify titles that are used in business communications. 5. Describe the importance of courtesy and tact in all business communications. 6. Create an outline as a letter planning tool. 7. Compose at least four samples from the list below: <ol style="list-style-type: none"> a. a letter of request b. transmittal letter c. letter of acknowledgement d. letter of complaint e. adjustment letter f. sales letter g. collection letter h. cover letter i. office memo j. business report 8. Describe the sizes and types of envelopes used for business correspondence. 9. Review and demonstrate proper addressing and posting of envelopes. 10. Using the appropriate paragraph symbols, indicate paragraphs in a non-paragraphed letter and appropriate use and size of font consistency. 11. Use internet tools to share documents. 12. Pass a business letter and report writing assessment with an 80% score or higher. 	<p>CTE Pathway: A7.1, A7.2</p>
<p>O. READING, LISTENING, AND SPEAKING SKILLS</p> <p>Understand, apply, and evaluate effective reading, listening, and speaking techniques.</p>	<ol style="list-style-type: none"> 1. Role-play scenarios using standard pronunciation, diction, vocabulary, and grammar. 2. Describe sensitivity toward and appreciation of diverse cultures and the tendency of bilinguals/multilinguals to use their mother languages to the exclusion of others in linguistically and culturally mixed groups. 3. Listen to an oral presentation and critique, orally and in writing, the content and delivery. 4. Read an article of your choice and identify fact as opposed to opinion. 5. Read a business article and identify the main idea in writing. 6. Read office-related employment opportunities, identify skills required, and determine qualifications. 7. Research information on an item in a supply or equipment catalog and prepare a requisition form. 8. As part of an evaluation, complete the following: read an article of interest and deliver a short speech on the article; use a recorder to record the speech and listen to the recording or watch the video; listen to other class members' speeches; take notes and write a summary of one of their speeches. 	<p>Career Ready Practice: 1, 2, 4, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3, 2.4 Technology: 4.1, 4.2 Technical Knowledge and Skills: 10.2</p> <p>CTE Pathway: A7.1, A7.2</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(6 hours)	9. Role-play three telephone or other communication platform scenarios and respond to the speaker using proper grammar and etiquette. 10. Take three written messages and describe the manner in which they should be delivered. 11. Pass a reading, listening, and speaking skills assessment with an 80% score or higher.	
P. EMPLOYABILITY SKILLS AND RESUME PREPARATION Understand, apply, and evaluate the employability skills and resume preparation desired of office technicians.	1. Understand and define employer requirements for soft skills such as: <ol style="list-style-type: none"> attitude toward work communication and collaboration critical thinking, problem solving, and decision-making customer service diversity in the workplace flexibility and adaptability interpersonal skills leadership and responsibility punctuality and attendance quality of work respect, cultural and diversity differences teamwork time management trust and ethical behavior work ethic 2. Develop a career plan that reflects career interests, pathways, and post-secondary options. 3. Create/revise a resume, cover letter and/or portfolio. 4. Demonstrate, analyze, research, and review the role of online job searching platforms and career websites to make informed decisions. 5. Understand the importance of assessing social media account content for professionalism. 6. Demonstrate and complete and/or review an on-line job application. 7. Understand and demonstrate interview skills to get the job: <ol style="list-style-type: none"> do's and don'ts for job interviews how to dress for the job 8. Demonstrate and create sample follow-up letters. 9. Understand the importance of the continuous upgrading of job skills as it relates to: <ol style="list-style-type: none"> certification, licensure, and/or renewal professional organizations/events industry associations and/or organized labor 	Career Ready Practice: 1, 2, 3, 4, 5, 7, 8, 9, 10, 11 CTE Anchor: Academics: 1.0 Communication: 2.1, 2.3, 2.4, 2.5 Career Planning and Management: 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8 Technology: 4.1, 4.2, 4.5 Problem Solving and Critical Thinking: 5.1, 5.4 Responsibility and Flexibility: 7.2, 7.3, 7.4, 7.7 Ethics and Legal Responsibilities: 8.3, 8.4, 8.5 Leadership and Teamwork: 9.1, 9.2, 9.3, 9.4, 9.6, 9.7 Technical Knowledge and Skills: 10.1 Demonstrate and Application: 11.1, 11.2, 11.5 CTE Pathway: A7.1, A7.2, A7.4
(4 hours)		

SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES

TEXTBOOKS

Barker, Loretta, Business Skills Exercises, 5th Edition, Cengage Learning, 2013

Guffey, Mary Ellen; Seefer, Carolyn M., Business English 13th Edition, Cengage Learning, 2020

SUPPLEMENTAL TEXTBOOKS

Schneiter-Williams, Karen. Basic English Review, 9th Edition, Cengage Learning, 2010

RESOURCES

Employer Advisory Board members

CDE Model Curriculum Standards for Business and Finance
<http://www.cde.ca.gov/ci/ct/sf/documents/bizfinance.pdf>

COMPETENCY CHECKLIST

TEACHING STRATEGIES and EVALUATION

METHODS AND PROCEDURES

- A. Lecture and discussion
- B. Demonstration
- C. Individualized instruction
- D. Multimedia presentations
- E. Development of critical thinking and listening skills
- F. Peer teaching and cooperative learning

EVALUATION

SECTION A – Introduction – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION B – Safety and Ergonomics – Pass the safety test with 100% accuracy.

SECTION C – Telephone Techniques – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION D – E-Mail – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION E – Mail – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION F – Office Tools & Equipment – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION G – Data Verification/Proofreading – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION H – Records Management – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION I – Reference Materials – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION J – Travel Arrangements – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION K – Grammar – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION L – Spelling and Vocabulary – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION M – Punctuation – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION N – Business Letter & Report Writing – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION O – Reading, Listening, & Speaking Skills – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION P – Employability Skills & Resume Preparation – Pass all assignments and exams on employability skills with a minimum score of 80% or higher.

Standards for Career Ready Practice

1. Apply appropriate technical skills and academic knowledge.

Career-ready individuals readily access and use the knowledge and skills acquired through experience and education. They make connections between abstract concepts with real-world applications and recognize the value of academic preparation for solving problems, communicating with others, calculating measures, and performing other work-related practices.

2. Communicate clearly, effectively, and with reason.

Career-ready individuals communicate thoughts, ideas, and action plans with clarity, using written, verbal, electronic, and/or visual methods. They are skilled at interacting with others: they are active listeners who speak clearly and with purpose, and they are comfortable with terminology that is common to workplace environments. Career-ready individuals consider the audience for their communication and prepare accordingly to ensure the desired outcome.

3. Develop an education and career plan aligned with personal goals.

Career-ready individuals take personal ownership of their educational and career goals and manage their individual plan to attain these goals. They recognize the value of each step in the educational and experiential process, and they understand that all career paths require ongoing education and experience to adapt to practices, procedures, and expectations of an ever-changing work environment. They seek counselors, mentors, and other experts to assist in the planning and execution of education and career plans.

4. Apply technology to enhance productivity.

Career-ready individuals find and maximize the productive value of existing and new technology to accomplish workplace tasks and solve workplace problems. They are flexible and adaptive in acquiring and using new technology. They understand the inherent risks—personal and organizational—of technology applications, and they take actions to prevent or mitigate these risks.

5. Utilize critical thinking to make sense of problems and persevere in solving them

Career-ready individuals recognize problems in the workplace, understand the nature of the problems, and devise effective plans to solve the problems. They thoughtfully investigate the root cause of a problem prior to introducing solutions. They carefully consider options to solve a problem and, once agreed upon, follow through to ensure the problem is resolved.

6. Practice personal health and understand financial literacy.

Career-ready individuals understand the relationship between personal health and workplace performance. They contribute to their personal well-being through a healthy diet, regular exercise, and mental health activities. Career-ready individuals also understand that financial literacy leads to a secure future that enables career success.

7. Act as a responsible citizen in the workplace and the community.

Career-ready individuals understand the obligations and responsibilities of being a member of a community and demonstrate this understanding every day through their interactions with others. They are aware of the impacts of their decisions on others and the environment around them, and they think about the short-term and long-term consequences of their actions. They are reliable and consistent in going beyond minimum expectations and in participating in activities that serve the greater good.

8. Model integrity, ethical leadership, and effective management.

Career-ready individuals consistently act in ways that align with personal and community-held ideals and principles. They employ ethical behaviors and actions that positively influence others. They have a clear understanding of integrity and act on this understanding in every decision. They use a variety of means to positively impact the direction and actions of a team or organization, and they recognize the short-term and long-term effects that management's actions and attitudes can have on productivity, morale, and organizational culture.

9. Work productively in teams while integrating cultural and global competence.

Career-ready individuals contribute positively to every team, as both team leaders and team members. To avoid barriers to productive and positive interaction, they apply an awareness of cultural differences. They interact effectively and sensitively with all members of the team and find ways to increase the engagement and contribution of other members.

10. Demonstrate creativity and innovation.

Career-ready individuals recommend ideas that solve problems in new and different ways and contribute to the improvement of the organization. They consider unconventional ideas and suggestions by others as solutions to issues, tasks, or problems. They discern which ideas and suggestions may have the greatest value. They seek new methods, practices, and ideas from a variety of sources and apply those ideas to their own workplace practices.

11. Employ valid and reliable research strategies.

Career-ready individuals employ research practices to plan and carry out investigations, create solutions, and keep abreast of the most current findings related to workplace environments and practices. They use a reliable research process to search for new information and confirm the validity of sources when considering the use and adoption of external information or practices.

12. Understand the environmental, societal, and economic impacts of decisions.

Career-ready individuals understand the interrelated nature of their actions and regularly make decisions that positively impact other people, organizations, the workplace, and the environment. They are aware of and utilize new technologies, understandings, procedures, and materials and adhere to regulations affecting the nature of their work. They are cognizant of impacts on the social condition, environment, workplace, and profitability of the organization.

Statement for Civil Rights

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