

**Career and Technical Education
Adapted CTE Course Blueprint
of
Essential Standards**

Business, Finance, and IT Education

6316 Business Financial Planning

Public Schools of North Carolina
State Board of Education • Department of Public Instruction
Academic Services and Instructional Support
Division of Career and Technical Education
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Raleigh, North Carolina
Summer 2012

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Adapted CTE Course Blueprint of Essential Standards

Essential standards are big, powerful ideas that are necessary and essential for students to know to be successful in a course. Essential standards identify the appropriate verb and cognitive process intended for the student to accomplish. Essential standards provide value throughout a student's career, in other courses, and translate to the next level of education or world of work.

The essential standards use Revised Bloom's Taxonomy (RBT) category verbs (remember, understand, apply, analyze, evaluate, create) that reflect the overall intended cognitive outcome of the indicators. Each essential standard and indicator reflects the intended level of learning through two dimensions; The Knowledge Dimension is represented with letters A-C, and the Cognitive Process Dimension by numbers 1-6.

This document will help teachers plan for curriculum delivery for the course, prepare daily lesson plans, and construct valid formative, benchmark, and summative assessments. Assessment for this course is written at the level of the **ESSENTIAL STANDARD** and assesses the intended outcome of the sum of its indicators. Curriculum provider is MBA Research & Curriculum Center.

For additional information about this blueprint, contact the Division of Career and Technical Education, North Carolina Department of Public Instruction, 6361 Mail Service Center, Raleigh, North Carolina 27699-6361.

Reference: Anderson, Lorin W. (Ed.), Krathwohl, David R. (Ed.), et al., *A Taxonomy for Learning, Teaching, and Assessing: A Revision of Bloom's Taxonomy of Educational Objectives*, Addison Wesley Longman, Inc., New York, 2001.

Interpretation of Columns on the NCDPI Adapted CTE Course Blueprint

No.	1	2	3	4
Heading	Essential Std #	Unit Titles, Essential Standards, and Indicators	Course Weight	RBT Designation
Column information	Unique course identifier and essential standard number.	Statements of unit titles, essential standards per unit, and specific indicators per essential standard. If applicable, includes % for each indicator.	Shows the relative importance of each unit and essential standard. Course weight is used to help determine the percentage of total class time to be spent on each essential standard.	Classification of outcome behavior in essential standards and indicators in Dimensions according to the Revised Bloom's Taxonomy. Cognitive Process Dimension: 1 Remember 2 Understand 3 Apply 4 Analyze 5 Evaluate 6 Create Knowledge Dimension: A Factual Knowledge B Conceptual Knowledge C Procedural Knowledge

Career and Technical Education conducts all activities and procedures without regard to race, color, creed, national origin, gender, or disability. The responsibility to adhere to safety standards and best professional practices is the duty of the practitioners, teachers, students, and/or others who apply the contents of this document.

Career and Technical Student Organizations (CTSO) are an integral part of this curriculum. CTOS are strategies used to teach course content, develop leadership, citizenship, responsibility, and proficiencies related to workplace needs.

**Adapted CTE Course Blueprint of Essential Standards for
6316 Business Financial Planning**
(Recommended hours of instruction: 135-180)

Essential Std #	Units, Essential Standards, and Indicators (The Learner will be able to:)	Course Weight	RBT Designation
1	2	3	4
	Total Course Weight	100%	
1.00	Understand professional development and financial analysis	12%	B2
	1.01 Utilize critical-thinking skills to determine best options/outcomes. (PD:019) 1.02 Acquire a foundational knowledge of accounting to understand its nature and scope. (FI:085, FI:351) 1.03 Acquire a foundational knowledge of finance to understand its nature and scope. (FI:354, FI:355) 1.04 Explore careers in finance to enhance potential for career success. (PD:152) 1.05 Understand financial markets to recognize their importance in business. (FI:336, FI:337) 1.06 Acquire knowledge of retail/business banking process and services to facilitate workplace activities. (PD:154, PD:204) 1.07 Acquire knowledge of the insurance industry to obtain a foundation for employment in insurance. (PD:157)		
2.00	Understand communication, selling, financial-information management, and financial analysis	20%	B2
	2.01 Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the customer (SE:406, SE:412, SE:407, SE:419, SE:405) 2.02 Acquire foundational knowledge of financial-information management to understand its scope and function. (FM:001, FM:002, FM:003) 2.03 Utilize financial information technology tools to manage financial information and perform work responsibilities. (FM:011) 2.04 Acquire fundamental knowledge of investment analysis and selection to make prudent investment decisions. (FI:276, FI: 277) 2.05 Write internal and external business correspondence to convey and obtain information effectively. (CO:040) 2.06 Acquire product knowledge to communicate product benefits and to ensure appropriateness of product for the client. (SE:428, SE:421, SE:429)		
3.00	Understand financial analysis and professional development	12%	B2
	3.01 Utilize sources of securities information to make informed financial decisions. (FI:274, FI:275) 3.02 Acquire knowledge of the securities and investments industry to understand the environment in which its services are offered. (PD:238, PD:236) 3.03 Acquire fundamental knowledge of investment analysis and selection to make prudent investment decisions. (FI:279, FI:280, FI:283) 3.04 Select investments to generate revenue for clients. (FI:281, FI:282, FI:284)		

4.00	Understand professional development, business law, financial analysis, compliance, and economics	12%	B2
	<p>4.01 Understand types of banking institutions to be aware of their roles in providing financial services. (PD:198)</p> <p>4.02 Understand government regulations pertaining to the finance industry to protect the company wellbeing. (BL:133, BL:134)</p> <p>4.03 Understand financial markets to recognize their importance in business. (FI:573)</p> <p>4.04 Acquire a foundational knowledge of compliance to understand its nature and scope. (CC:003, CC:004)</p> <p>4.05 Acquire knowledge of the impact of government on business activities to make informed economic decisions. (EC:072)</p> <p>4.06 Analyze cost/profit relationships to guide business decision-making. (EC:015, EC:014, EC:023)</p>		
5.00	Understand economics and financial analysis	16%	B2
	<p>5.01 Understand economic indicators to recognize economic trends and conditions. (EC:083, EC:081, EC:017, EC:082, EC:084, EC:018)</p> <p>5.02 Understand financial markets to recognize their importance in business. (FI:574, FI:575)</p> <p>5.03 Determine global trade's impact on business decision-making to acquire insight into the global forces affecting business. (EC:016, EC:045, EC:100)</p>		
6.00	Understand customer relations, communication skills, professional development, and marketing	20%	B2
	<p>6.01 Understand characteristics, motivations, and behaviors of clients in finance to facilitate client interaction. (CR:012)</p> <p>6.02 Foster positive relationships with customers to enhance company image. (CR:004, CR:005, CR:006, CR:019, CR:007)</p> <p>6.03 Write internal and external business correspondence to convey and obtain information effectively. (CO:039, CO:133)</p> <p>6.04 Resolve conflicts with/for customers to encourage repeat business. (CR:009, CR:010)</p> <p>6.05 Utilize critical-thinking skills to determine best options/outcomes. (PD:012)</p> <p>6.06 Reinforce company's image to exhibit the company's brand promise. (CR:001, CR:002)</p> <p>6.07 Acquire foundational/knowledge of customer/client/business behavior to understand what motivates decision-making. (MK:014, MK:015)</p> <p>6.08 Understand the nature of customer relationship management to show its contributions to a company. (CR:016, CR:017)</p> <p>6.09 Utilize technology to facilitate customer relationship management. (CR:018, CR:024)</p> <p>6.10 Understand marketing's role and function in business to facilitate economic exchanges with customers. (MK:002)</p>		
7.00	Understand human resources management and professional development	8%	B2
	<p>7.01 Manage staff growth and development to increase productivity and employee satisfaction. (HR:360)</p> <p>7.02 Utilize career-advancement activities to enhance professional development. (PD:082, PD:153)</p>		