



# PRINCIPLES OF BUSINESS ADMINISTRATION EVENTS

PRINCIPLES OF BUSINESS MANAGEMENT AND ADMINISTRATION **PBM**

PRINCIPLES OF FINANCE **PFN**

*Sponsored by Anderson Advisors*

PRINCIPLES OF HOSPITALITY AND TOURISM **PHT**

PRINCIPLES OF MARKETING **PMK**

DECA's **Principles of Business Administration Events** measure the student's proficiency in those knowledge and skills identified by career practitioners as common academic and technical content across marketing, finance, hospitality, and business management and administration.

The Principles of Business Administration Events are designed for **first-year DECA members** who are enrolled in introductory-level principles of marketing/business courses. Advanced students with multiple course credits in this area are better served in more advanced competitive events. **Students who were previously members of DECA are not eligible for these events.**

The guidelines for each of the Principles of Business Administration Events have been consolidated to facilitate coordination of participant activities in each career category. This means the guidelines are exactly the same for each career category. However, each career category's role-play will be career specific and will be different and distinct from the role-plays of the other career categories.

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the activities and careers that are included in each of the Principles of Business Administration Events.

### BUSINESS MANAGEMENT + ADMINISTRATION

**Principles of Business Management and Administration:** The role-plays will use concepts associated with careers in administrative services, business information management, general management, human resources management, and operations management.

### FINANCE

**Principles of Finance:** The role-plays will use concepts associated with careers in accounting, banking services, business finance, insurance and securities, and investments.

### HOSPITALITY + TOURISM

**Principles of Hospitality and Tourism:** The role-plays will use concepts associated with careers in hotels, restaurants, and tourism and travel.

### MARKETING

**Principles of Marketing:** The role-plays will use concepts associated with careers in marketing communications, marketing management, marketing research, merchandising and professional selling.

## KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills described by selected business administration core performance indicators that are aligned with National Curriculum Standards and industry validated. Complete lists of performance indicators are available at [deca.org](http://deca.org). Participants in these competitive events are not informed in advance of the performance indicators to be evaluated.

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## EVENT OVERVIEW

- Principles of Business Administration Events consist of two major parts: a **business administration core exam** and a **role-play** with a business executive. A second role-play event will be given to finalists. The business administration core exam items and the role-play situations are selected from a list of performance indicators identified in the National Curriculum Standards for Business Administration developed by MBA Research for the Career Clusters® Framework and validated by industry representatives.
- The participant will be given a 100-question, multiple-choice, **business administration core exam**.
- The participant will be given a business situation to review. In the **role-play**, the participant must respond to the business situation by translating what he/she has learned into effective, efficient and spontaneous action.
- A list of four performance indicators specific to the business situation is included in the participant's instructions. These are distinct tasks the participant must accomplish during the role-play. The judge will evaluate the participant's performance on these tasks, follow-up questions and 21<sup>st</sup> Century Skills.
- The participant will have **10 minutes** to review and to develop a professional approach to the business situation. Participants may use notes made during the preparation time during the role-play.
- Up to **10 minutes** are then allowed for the participant to interact with a judge and explain the designated concepts. The judge is a qualified business executive. Following the role-play, the judge evaluates the participant's responses and records the results on an evaluation form developed especially for each role-play event.
- The participant may not bring printed reference materials, visual aids, etc., to the competitive event. The participant may use a four-function calculator during the exam and preparation period. Scientific/graphing calculators, cell phones/smartphones, iPods/MP3 players and iPads/tablets may not be used.
- Materials appropriate for the situation may be handed to or left with the judge. Materials handed to the judge must be created using materials provided during the designated preparation period.
- If any of these rules are violated, the adult assistant must be notified by the judge.
- The maximum score for the evaluation is 100 points. The presentation will be weighed twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.

## PRESENTATION JUDGING

The participant will be evaluated according to the Evaluation Form associated with the role-play.

The participant will have a 10-minute preparation period and may make notes to use during the role-play.

After introductions, the judge will begin the 10-minute role-play. Following the participant's response to the business situation, the judge will ask the questions related to the role-play that are provided in the event. These questions will cause the participant to think and respond beyond the performance indicators provided.

The judge will close the role-play by thanking the participant for his/her work. Then the judge will complete the Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



1 PARTICIPANT



BUSINESS ADMIN  
CORE EXAM



1 ROLE-PLAY



10 MINUTES  
PREPARATION TIME



10 MINUTES  
INTERVIEW TIME



# TEAM DECISION MAKING EVENTS

- BUSINESS LAW AND ETHICS TEAM DECISION MAKING **BLTDM**
- BUYING AND MERCHANDISING TEAM DECISION MAKING **BTDM**
- ENTREPRENEURSHIP TEAM DECISION MAKING **ETDM**
- FINANCIAL SERVICES TEAM DECISION MAKING **FTDM**
- HOSPITALITY SERVICES TEAM DECISION MAKING **HTDM**
- MARKETING MANAGEMENT TEAM DECISION MAKING **MTDM**
- SPORTS AND ENTERTAINMENT MARKETING TEAM DECISION MAKING **STDM**
- TRAVEL AND TOURISM TEAM DECISION MAKING **TTDM**

DECA's **Team Decision Making Events** measure students' ability to analyze one or a combination of elements essential to the effective operation of a business in the specific career area. The business situation to be analyzed will be presented as a case study.

The guidelines for each of the Team Decision Making Events have been consolidated to facilitate coordination of the participant activities in each career category. This means the guidelines will be exactly the same for each career category. However, each career category's case study will be career specific and will be different and distinct from the case studies of the other career categories.

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the activities and careers that are included in each of the Team Decision Making Events.

### BUSINESS MANAGEMENT + ADMINISTRATION

**Business Law and Ethics:** Business law is U.S. law and will include contracts, product liability, employment and types of business ownership. The ethics component involves evaluating competing social values that may reasonably be argued from either side.

### ENTREPRENEURSHIP

**Entrepreneurship:** Entrepreneurship includes the ability to recognize opportunities and to act on them, determine needs, identify markets, utilize marketing research, identify sources of capital and use management skills.

### FINANCE

**Financial Services:** Financial services refer to services offered in the finance industry by financial institutions. Concepts include understanding the source and purpose of financial statements, the impact of management decisions on statements, and the analysis and interpretation of data for planning purposes.

### HOSPITALITY + TOURISM

**Hospitality Services:** Hospitality services include marketing and management functions and tasks that can be applied in hotels, motels, lodging services, convention services, and food and beverage services.

**Travel and Tourism:** Travel and tourism includes marketing and management functions and tasks that can be applied in enterprises engaged in passenger transportation, travel service, attracting and serving the traveling public, arranging tours or acting as independent ticket agencies, and other services incidental to the travel or tourism industry.

## KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills described by selected business administration core and career cluster performance indicators that are aligned with National Curriculum Standards and industry validated. Complete lists of performance indicators are available at [deca.org](http://deca.org). Participants in these competitive events are not informed in advance of the performance indicators to be evaluated.

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

**Buying and Merchandising:** Buying and merchandising positions get the product into the hands of the customer through forecasting, planning, buying, displaying, selling and providing customer service.

**Marketing Management:** Marketing management includes marketing and management functions and tasks that can be applied broadly in a non-retail marketing environment.

**Sports and Entertainment Marketing:** Sports and entertainment marketing includes marketing functions and tasks that can be applied in amateur or professional sports or sporting events, entertainment or entertainment events, selling or renting of supplies and equipment (other than vehicles) used for recreational or sporting purposes or products and services related to hobbies, leisure or cultural events.

## EVENT OVERVIEW

- Team Decision Making Events consist of two major parts: a written **cluster exam** and one **case study situation**. A second case study situation will be given to finalists.
- Each team must be composed of **two members** of the DECA chapter.
- Each team member will be given a 100-question, multiple-choice, **cluster exam**. The scores will be averaged to produce a single team score.
- Team members will be given a decision-making **case study situation** involving a problem in a business in the career area.
- A list of seven performance indicators specific to the scenario is included in the participants' instructions. These are distinct tasks the participants must accomplish during the role-play. The judge will evaluate the participants' role-play performance on these tasks, follow-up questions and 21<sup>st</sup> Century Skills.
- Each team will have **30 minutes** to study the situation and organize its analysis using a team decision making format. During the preparation period, teams may consult only with one another about the situation. Participants may use notes made during the preparation time during the presentation.
- Participant teams will meet with the judge for a **15-minute presentation**. The judge is a qualified business executive. Both members of the team must participate in the presentation. The judge may ask questions of the participants within the 15 minutes.
- Participants may not bring printed reference materials, audio or visual aids, etc., to the competitive event. Participants may use a four-function calculator during the exam and preparation period. Scientific/graphing calculators, cell phones/smartphones, iPods/MP3 players and iPads/tablets may not be used.
- Materials appropriate for the situation may be handed to or left with the judge. Materials handed to the judge must be created using materials provided during the designated preparation period.
- If any of these rules are violated, the adult assistant must be notified by the judge.
- The maximum score for the evaluation is 100 points. The presentation will be weighted twice (2 times) the value of the averaged exam score. The exam score carries forward into the final round of competition.

## PRESENTATION JUDGING

Participants will be evaluated according to the Evaluation Form associated with the case study.

Participants will have a 30-minute preparation period and may make notes to use during the role-play.

After introductions, the team will begin the 15-minute presentation and present its analysis, its decisions and the rationale behind the decisions. The judge will allow the team to complete this portion without interruption, unless asked to respond.

Following the participants' presentation and if time remains, the judge may ask questions of the team to determine its understanding of the situation presented. Each member of each team should respond to at least one question. To ensure fairness, the judge must ask each team the same questions. After asking the standard questions, the judge may ask questions for clarification specific to the current team.

After the questioning period, the judge will close the role-play by thanking the team for its work. Then the judge completes the Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



2 PARTICIPANTS



CLUSTER SPECIFIC EXAM



1 CASE STUDY



30 MINUTES PREPARATION TIME



15 MINUTES INTERVIEW TIME



# INDIVIDUAL SERIES EVENTS

- ACCOUNTING APPLICATIONS SERIES **ACT**
- APPAREL AND ACCESSORIES MARKETING SERIES **AAM**
- AUTOMOTIVE SERVICES MARKETING SERIES **ASM**
- BUSINESS FINANCE SERIES **BFS**
- BUSINESS SERVICES MARKETING SERIES **BSM**
- ENTREPRENEURSHIP SERIES **ENT**
- FOOD MARKETING SERIES **FMS**
- HOTEL AND LODGING MANAGEMENT SERIES **HLM**
- HUMAN RESOURCES MANAGEMENT SERIES **HRM**
- MARKETING COMMUNICATIONS SERIES **MCS**
- QUICK SERVE RESTAURANT MANAGEMENT **QSRM**
- RESTAURANT AND FOOD SERVICE MANAGEMENT SERIES **RFSM**
- RETAIL MERCHANDISING SERIES **RMS**
- SPORTS AND ENTERTAINMENT MARKETING SERIES **SEM**

DECA's **Individual Series Events** effectively measure the student's proficiency in the knowledge and skills identified by occupational practitioners as essential to success in a given career. The student is given a description of a specific situation that measures skills, knowledge and attitudes in a given career. Roles in these events could be content area expert, client, customer, employee, supervisor, manager or entrepreneur.

The guidelines for each of the Individual Series Events have been consolidated to facilitate coordination of participant activities in each career category. This means the guidelines are exactly the same for each career category. However, each career category's role-play will be career specific and will be different and distinct from the role-plays of the other career categories.

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the activities and careers that are included in each of the Individual Series Events.

### BUSINESS MANAGEMENT + ADMINISTRATION

**Human Resources Management:** (Human Resources Management Pathway) Students will be challenged to perform management functions and tasks focusing on staffing, recruitment, selection, training, performance appraisal, compensation and safety training.

### ENTREPRENEURSHIP

**Entrepreneurship:** Students will be challenged to perform the ability to recognize opportunities and to act on them, determine needs, identify markets, utilize marketing research, identify sources of capital and use management skills.

### FINANCE

**Accounting Applications:** (Accounting Pathway) Students will be challenged to perform management functions and tasks focusing on the application of financial data to business planning, including collection and organization of data, development and use of reports, and analysis of data to make business decisions. Concepts include understanding the source and purpose of financial statements, the impact of management decisions on statements, and the analysis and interpretation of data for planning.

**Business Finance:** (Corporate Finance Pathway) Students will be challenged to perform management functions and tasks focusing on high-level financial and business planning, including collection and organization of data, development and use of reports, and analysis of data to make business decisions. Concepts include understanding the source and purpose of financial statements, the impact of management decisions on statements, and the analysis and interpretation of data for corporate planning.

## KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills described by the business administration core, the appropriate career cluster core, and the appropriate career pathway performance indicators that are aligned with National Curriculum Standards and industry validated. Complete lists of performance indicators are available at [deca.org](http://deca.org). Participants in these competitive events are not informed in advance of the performance indicators to be evaluated.

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

**Hotel and Lodging Management:** (Lodging Pathway) Students will be challenged to perform marketing and management functions and tasks in hotels, motels, lodging services, convention services, and food and beverage services.

**Quick Serve Restaurant Management:** (Restaurant Management Pathway) Students will be challenged to perform marketing and management functions and tasks in retail establishments, wholesale establishments and manufacturing firms primarily engaged in the quick-serve restaurant industry.

**Restaurant and Food Service Management:** (Restaurant Management Pathway) Students will be challenged to perform marketing and management functions and tasks in a full-service restaurant or a food-service business.

## MARKETING

**Apparel and Accessories Marketing:** (Merchandising Pathway) Students will be challenged to perform marketing and management functions and tasks in retail establishments, wholesale establishments and/or manufacturing firms primarily engaged in the marketing of clothing and related articles for personal wear and adornment.

**Automotive Services Marketing:** (Marketing Management Pathway) Students will be challenged to perform marketing and management functions and tasks related to auto dealers, service stations and related businesses or auto parts stores.

**Business Services Marketing:** (Marketing Management Pathway) Students will be challenged to perform marketing functions and tasks involved in providing services to businesses on a fee or contract basis or providing services to consumers.

**Food Marketing:** (Marketing Management Pathway) Students will be challenged to perform marketing and management functions and tasks in retail establishments, wholesale establishments and manufacturing firms resulting in the sale of food.

**Marketing Communications:** (Marketing Communications Pathway) Students will be challenged to perform in marketing communications and marketing functions and tasks that inform, persuade, or remind a target market of ideas, experiences, goods or services.

**Retail Merchandising:** (Merchandising Pathway) Students will be challenged to perform marketing and management functions and tasks that can be applied in any retail establishment.

**Sports and Entertainment Marketing:** (Marketing Management Pathway) Students will be challenged to perform marketing and management functions and tasks related to amateur or professional sports or sporting events, entertainment or entertainment events, selling or renting of supplies and equipment (other than vehicles) used for recreational or sporting purposes, products and services related to hobbies or cultural events, or businesses primarily engaged in satisfying the desire to make productive or enjoyable use of leisure time.

## EVENT OVERVIEW

- Individual Series Events consist of two major parts: a written **cluster exam** and two preliminary **role-playing events**. A third role-play event will be given to finalists.
- The participant will be given a 100-question, multiple-choice, **cluster exam**.
- The participant will be given a written scenario to review. It may indicate a product or service to sell; a merchandising decision; a situation involving communications, human relations, economics or professional development; or a business management consideration. The event description will inform the participant of the role he/she will play and the role the judge will play.
- In the **role-play**, the participant must accomplish a task by translating what they have learned into effective, efficient and spontaneous action.
- A list of five performance indicators specific to the scenario is included in the participant's instructions. These are distinct tasks the participant must accomplish during the role-play. The judge will evaluate the participant's role-play performance on these tasks, follow-up questions and 21<sup>st</sup> Century Skills.
- The participant will have **10 minutes** to review the situation and to develop a professional approach to solving the problem. Participants may use notes made during the preparation time during the presentation.
- Up to **10 minutes** are then allowed for the participant to interact with a judge and demonstrate how he/she would solve the situation or problem. The judge is a qualified business executive playing the role of a second party in the situation. Following the role-play, the judge evaluates the participant's responses and records the results on an evaluation form developed especially for each role-play event.
- The participant may not bring printed reference materials, visual aids, etc., to the competitive event. The participant may use a four-function calculator during the exam and preparation period. Scientific/graphing calculators, cell phones/smartphones, iPods/MP3 players and iPads/tablets may not be used.
- Materials appropriate for the situation may be handed to or left with the judge. Materials handed to the judge must be created using materials provided during the designated preparation period.
- If any of these rules are violated, the adult assistant must be notified by the judge.
- The maximum score for the evaluation is 100 points. The cluster exam and each role-play presentation will be valued at one-third (1/3) of the total score. In the final round of competition, the role-play presentation will be weighted twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.

## PRESENTATION JUDGING

The participant will be evaluated according to the Evaluation Form associated with the role-play.

The participant will have a 10-minute preparation period and may make notes to use during the role-play.

After introductions, the judge will begin the 10-minute role-play. Following the participant's explanation of the solution to the role-play, the judge will ask the questions related to the scenario that are provided in the event. These questions will cause the participant to think and respond beyond the performance indicators provided.

The judge will close the role-play by thanking the participant for his/her work. Then the judge will complete the Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



1 PARTICIPANT



CLUSTER  
SPECIFIC EXAM



2 ROLE-PLAYS



10 MINUTES  
PREPARATION TIME



10 MINUTES  
INTERVIEW TIME



# PERSONAL FINANCIAL LITERACY

## PERSONAL FINANCIAL LITERACY PFL

*Sponsored by Anderson Advisors*

DECA's **Personal Financial Literacy Event** measures the personal finance knowledge and skills that K-12 students should possess. The Personal Financial Literacy Event is designed to measure the student's ability to apply reliable information and systematic decision making to personal financial decisions.

The Personal Financial Literacy Event is designed for DECA members who are enrolled in personal finance and financial literacy courses.

Many organizations have defined "personal finance" and "financial literacy." The following, a distillation of the views of several sources, are the definitions underlying the National Standards:

- Personal finance describes the principles and methods that individuals use to acquire and manage income and assets.
- Financial literacy is the ability to use knowledge and skills to manage one's financial resources effectively for lifetime financial security.

## PERSONAL FINANCIAL LITERACY

## KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills described by the National Standards for Personal Financial Education, developed by the Council for Economic Education and the Jump\$tart Coalition for Personal Financial Literacy. Broadly, students will be assessed on their knowledge of areas such as:

- Earning Income
- Spending
- Saving
- Investing
- Managing Credit
- Managing Risk

Complete lists of performance indicators are available at [deca.org](http://deca.org). Participants in these competitive events are not informed in advance of the performance indicators to be evaluated.

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.



## EVENT OVERVIEW

- The Personal Financial Literacy Event consists of two major parts: a **financial literacy exam** and a **role-play scenario** with a business executive. A second role-play event will be given to finalists. The financial literacy exam items and the content interview situations are selected from a list of performance indicators identified in the National Standards for Personal Financial Education, developed by the Council for Economic Education and the Jump\$tart Coalition for Personal Financial Literacy.
- The participant will be given a 100-question, multiple-choice, **financial literacy exam**.
- The participant will be given a written scenario to review. In the **role-play**, the participant must accomplish a task by translating what they have learned into effective, efficient and spontaneous action.
- A list of three performance indicators specific to the role-play is included in the participant's instructions. These are distinct tasks the participant must accomplish during the role-play. The judge will evaluate the participant's performance on these tasks, follow-up questions and 21<sup>st</sup> Century Skills.
- The participant will have **10 minutes** to review the scenario and to develop a professional approach to the role-play scenario. Participants may use notes made during the preparation time during the role-play.
- Up to **10 minutes** are then allowed for the participant to interact with a judge and explain the designated concepts. The judge is a qualified business executive. Following the role-play, the judge evaluates the participant's responses and records the results on an evaluation form developed especially for each role-play event.
- The participant may not bring printed reference materials, visual aids, etc., to the competitive event. The participant may use a four-function calculator during the exam and preparation period. Scientific/graphing calculators, cell phones/smartphones, iPods/MP3 players and iPads/tablets may not be used.
- Materials appropriate for the situation may be handed to or left with the judge. Materials handed to the judge must be created using materials provided during the designated preparation period.
- If any of these rules are violated, the adult assistant must be notified by the judge.
- The maximum score for the evaluation is 100 points. The presentation will be weighed at twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.

## PRESENTATION JUDGING

The participant will be evaluated according to the Evaluation Form associated with the role-play.

The participant will have a 10-minute preparation period and may make notes to use during the role-play.

After introductions, the judge will begin the 10-minute role-play. Following the participant's response to the role-play, the judge will ask the questions related to the scenario that are provided in the event. These questions will cause the participant to think and respond beyond the performance indicators provided.

The judge will close the role-play by thanking the participant for his/her work. Then the judge will complete the Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



1 PARTICIPANT



FINANCIAL  
LITERACY EXAM



1 ROLE-PLAY



10 MINUTES  
PREPARATION TIME



10 MINUTES  
INTERVIEW TIME



# PENALTY POINT CHECKLIST

	CHECKED	PENALTY POINTS ASSESSED	PAGE NUMBER
1. The Written Statement of Assurances and Academic Integrity must be signed by all participants and the chapter advisor and placed in front of the written entry. Only physical signatures or digital signatures will be accepted. Typed names in a font will not be accepted as signatures.	_____	15	_____
2. Limited to the number of pages specified in the guidelines (plus the title page and the table of contents).	_____	5 (per page)	_____
3. All pages are numbered in sequence starting with the executive summary and ending with the final page of the appendix. Do not use separate pages between sections or as title pages for sections.	_____	5	_____
4. The written entry follows the outline in the Written Entry Guidelines for the event. Additional subsections are permitted in the body of the written entry.	_____	5	_____
5. The entry must be typed and use a page size of 8½ inches x 11 inches. Handwritten correction, notes, charts and graphs will be penalized.	_____	5	_____

**TOTAL PENALTY POINTS ASSESSED** \_\_\_\_\_

*A check indicates that the item has been examined.  
 A circled number indicates that an infraction has been noted.  
 A page number indicates the location of the infraction.*

If the written entry must be submitted as a printed copy at district/region or association level competition, the following penalty points are also recommended to be assessed. Please consult with your chartered association advisor regarding penalty points at district/regional and association competition. Items 6, 7 and 8 will not be reviewed at the DECA International Career Development Conference.

6. Entries submitted in an official DECA written event folio. Folios are available from Shop DECA. No markings, tape or other material should be attached to the folio. One photocopy or the original typed document must be submitted. Participants may keep a copy for use in the presentation.	_____	5	_____
7. Written entry must be printed single-sided.	_____	5	_____
8. No sheet protectors, fold-outs, attachments or tabs used.	_____	5	_____

**TOTAL PENALTY POINTS ASSESSED** \_\_\_\_\_



# WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY

Research and report writing are important elements of modern business activities. Great care must be taken to assure that the highest ethical standards are maintained by those engaging in research and report writing. To reinforce the importance of these standards, all written entries in DECA's Competitive Events Program must submit this statement as part of the entry. The statement **must** be signed by the DECA member(s) and the chapter advisor.

I understand the following requirements are set forth by DECA Inc. for all Competitive Event entries containing a written component. These requirements are additional to the general rules and regulations published by DECA Inc. By signing this statement, I certify that all are true and accurate as they relate to this entry.

1. The contents of this entry are the results of my work or, in the case of a team project, the work of current members of this DECA chapter.
2. No part of this entry has previously been entered in competition.
3. This entry has not been submitted in another DECA competitive event.
4. Credit for all secondary research has been given to the original author through the project's bibliography, footnotes or endnotes.
5. All activities or original research procedures described in this entry are accurate depictions of my efforts or, in the case of team projects, the efforts of my team.
6. All activities or original research described in this entry took place between the 2023 Chartered Association Career Development Conference and the 2024 Chartered Association Career Development Conference.
7. I understand that DECA has the right to publish all or part of this entry. Should DECA elect to publish the entire entry, I will receive an honorarium from DECA. Chapters or individuals with extenuating circumstances may appeal the right to publish the entry to the executive committee of the board of directors prior to April 1.

*This statement of assurances must be signed by all participants and the chapter advisor, and submitted with the entry, or the entry will be given 15 penalty points.*

*Only physical signatures or digital signatures will be accepted. Typed names in a font will not be accepted as signatures.*

*Place in front of the written entry. Do not count as a page.*

_____ Participant's Signature	_____ Participant's Signature	_____ Participant's Signature
_____ Participant's Name	_____ Participant's Name	_____ Participant's Name
_____ Competitive Event	_____ School	_____ Chartered Association (State/Province)

To the best of my knowledge, I verify that the above statements are true and that the student's (students') work does not constitute plagiarism.

*Only physical signatures or digital signatures will be accepted. Typed names in a font will not be accepted as signatures.*

_____ Chapter Advisor's Name	_____ Chapter Advisor's Signature
_____ Chapter Advisor's Email	



# BUSINESS OPERATIONS RESEARCH EVENTS

**BUSINESS SERVICES OPERATIONS RESEARCH BOR**

*Sponsored by Piper Sandler*

**BUYING AND MERCHANDISING OPERATIONS RESEARCH BMOR**

*Sponsored by Piper Sandler*

**FINANCE OPERATIONS RESEARCH FOR**

*Sponsored by Anderson Advisors*

**HOSPITALITY AND TOURISM OPERATIONS RESEARCH HTOR**

**SPORTS AND ENTERTAINMENT MARKETING OPERATIONS RESEARCH SEOR**

*Sponsored by Piper Sandler*

The **Business Operations Research Events** provide an opportunity for participants to demonstrate knowledge and skills needed by management personnel through the preparation of a detailed written strategic plan and presentation based on the results of a research study.

Participants in the Business Operations Research Events will:

- select an actual local business operation
- design a research study
- conduct a research study
- analyze the results of the research study
- prepare a strategic plan
- prepare a proposed budget
- present in a role-play situation
  - the design of the research study
  - the findings and conclusions of the research study
  - the proposed strategic plan
  - the proposed budget to enact the suggested strategies

The guidelines for each of the Business Operations Research Events are consolidated to facilitate coordination of participant activities in each of the career categories. This means the guidelines will be exactly the same for each career category. However, each career category will be treated separately as a competitive event.

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the activities or careers that are included in each of the Business Operations Research Events. These career categories are connected to career clusters.

### BUSINESS MANAGEMENT + ADMINISTRATION

**Business Services:** Providing services to businesses on a fee or contract basis or providing services to consumers. Examples may include: human resources companies, information technology companies, legal services firms, training and development organizations, health care service providers, libraries, construction companies, landscaping companies, beauty salons, car washes, automotive repair companies, interior decorating, child care services, photography and tutoring services.

### FINANCE

**Finance:** Providing financial services to commercial and retail customers. Examples may include: banks, credit unions, accounting firms, investment companies, insurance companies and real estate firms.

### HOSPITALITY + TOURISM

**Hospitality and Tourism:** Providing products and services related to event management, lodging, restaurant management and travel and tourism industries. Examples may include: hotels, lodging services, convention services, food and beverage services, restaurants, museums, amusement parks, zoos and other tourism-related businesses.

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

**Buying and Merchandising:** Getting the product into the hands of the customer through forecasting, planning, buying, displaying, selling and providing customer service. Examples may include any retail or wholesale business that provides consumer goods: specialty stores, department stores, shopping malls, grocery stores, convenience stores, pharmacies, discount stores, farmers markets and car dealerships.

**Sports and Entertainment Marketing:** Providing products, services or experiences relating to amateur or professional sports or sporting events, entertainment or entertainment events, selling or renting of supplies and equipment (other than vehicles) used for recreational or sporting purposes or products and services related to hobbies, leisure or cultural events. Examples may include: sports team, movie theaters, waterparks, music venues, concerts, festivals, amateur practice facilities, tournaments, summer camps, outdoor adventure companies and craft/music classes.

## EVENT OVERVIEW

- The Business Operations Research Events consist of two major parts: the **written document** and the **oral presentation** by the participants. The written document will account for 60 points and the oral presentation will account for the remaining 40 of the total 100 points.
- Each Business Operations Research entry will be composed of **one to three members** of the DECA chapter. All participants must present the project to the judges.
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum **15 minutes** in length, including time for the judge's questions.
- For the presentation, the participants are to assume the role of hired consultants. The judge will assume the role of the owner/manager of the business/organization and will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

## 2023-2024 TOPIC

The 2023-2024 topic for each career category is the development of a strategy to combat the talent challenge. Businesses today are facing labor shortages across all industries. Participants will collaborate with a local business or organization to analyze the current process for recruiting, hiring, onboarding and retaining employees. Participants will then create and present a strategic plan to attract and retain employees.



1-3 PARTICIPANTS



20 PAGES  
ALLOWED



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

NAME OF THE EVENT (one of the following):

- BUSINESS SERVICES OPERATIONS RESEARCH EVENT
- BUYING AND MERCHANDISING OPERATIONS RESEARCH EVENT
- FINANCE OPERATIONS RESEARCH EVENT
- HOSPITALITY AND TOURISM OPERATIONS RESEARCH EVENT
- SPORTS AND ENTERTAINMENT MARKETING OPERATIONS RESEARCH EVENT

Name of high school

School address

City, State/Province, ZIP/Postal Code

Names of participants

Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One- to three-page description of the project

### II. INTRODUCTION

- A. Description of the business or organization
- B. Description of the target market (demographics and psychographics)
- C. Overview of the business or organization’s current process for recruiting, hiring, onboarding and retaining employees

### III. RESEARCH METHODS USED IN THE STUDY

- A. Description and rationale of research methodologies selected to conduct the research study
- B. Process used to conduct the selected research methods

### IV. FINDINGS AND CONCLUSIONS OF THE STUDY

- A. Findings of the research study
- B. Conclusions based on the findings

### V. PROPOSED STRATEGIC PLAN

- A. Objectives and rationale of the proposed strategic plan
- B. Proposed activities and timelines
- C. Proposed metrics or key performance indicators to measure plan effectiveness

### VI. PROPOSED BUDGET

Costs associated with proposed strategies

### VII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

### VIII. APPENDIX

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

## PENALTY POINT CHECKLIST

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## PRESENTATION GUIDELINES

- Prior to the presentation, a judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants have assumed the roles of hired consultants. The judge is to assume the role of the business's/organization's owner/manager.
- The participants will present the plan to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry to use as reference during the presentation.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## PRESENTATION JUDGING

Participants will make a 15-minute presentation to you. Remember, you are taking on the role of the owner/manager of the business/organization.

At the beginning of the presentation (after introductions), the participants will explain the proposed strategic plan. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participant(s). Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 40 points.



# BUSINESS OPERATIONS RESEARCH EVENTS

BUSINESS SERVICES OPERATIONS RESEARCH **BOR**  
 BUYING AND MERCHANDISING OPERATIONS RESEARCH **BMOR**  
 FINANCE OPERATIONS RESEARCH **FOR**  
 HOSPITALITY AND TOURISM OPERATIONS RESEARCH **HTOR**  
 SPORTS AND ENTERTAINMENT MARKETING OPERATIONS RESEARCH **SEOR**

## WRITTEN ENTRY EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One- to three-page description of the project	0-1-2-3	4-5-6	7-8	9-10	
INTRODUCTION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Description of the business or organization	0	1	2	3	
3. Description of the target market (demographics and psychographics)	0	1	2	3	
4. Overview of the business or organization's current process for recruiting, hiring, onboarding and retaining employees.	0	1	2	3	
RESEARCH METHODS USED IN THE STUDY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Description and rationale of research methodologies selected to conduct the research study	0-1	2	3	4	
6. Process used to conduct the selected research methods	0-1	2	3	4	
FINDINGS AND CONCLUSIONS OF THE STUDY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Findings of the research study	0-1	2	3	4	
8. Conclusions based on the findings	0-1	2	3	4	
PROPOSED STRATEGIC PLAN	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
9. Objectives and rationale of the proposed strategic plan	0-1	2-3	4-5	6	
10. Proposed activities and timelines	0-1	2-3	4-5	6	
11. Proposed metrics or key performance indicators to measure plan effectiveness	0-1	2-3	4-5	6	
PROPOSED BUDGET	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
12. Costs associated with proposed strategies	0-1	2	3	4	
APPEARANCE AND WORD USAGE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
13. Professional layout, neatness, proper grammar, spelling and word usage	0	1	2	3	

**WRITTEN ENTRY TOTAL POINTS (60)** \_\_\_\_\_

JUDGE \_\_\_\_\_





# BUSINESS OPERATIONS RESEARCH EVENTS

BUSINESS SERVICES OPERATIONS RESEARCH **BOR**  
 BUYING AND MERCHANDISING OPERATIONS RESEARCH **BMOR**  
 FINANCE OPERATIONS RESEARCH **FOR**  
 HOSPITALITY AND TOURISM OPERATIONS RESEARCH **HTOR**  
 SPORTS AND ENTERTAINMENT MARKETING OPERATIONS RESEARCH **SEOR**

## PRESENTATION EVALUATION FORM

PRESENTATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Opening presentation; description of the plan; organization, clarity and effectiveness of the presentation	0-1-2-3	4-5-6	7-8	9-10	

TO WHAT EXTENT DID THE PARTICIPANTS:	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Describe methods used to the design research study?	0-1	2-3	4-5	6	
3. Interpret the research data into information for decision-making?	0-1	2-3	4-5	6	
4. Describe strategies and approaches for leading change?	0-1	2-3	4-5	6	
5. Describe the nature of budgets?	0-1	2-3	4-5	6	

GENERAL	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. Professional standards (appearance, poise, confidence), presentation technique, effective use of visuals and participation of all	0-1	2-3	4-5	6	

<b>PRESENTATION TOTAL POINTS (40)</b>	
WRITTEN ENTRY (60)	
PRESENTATION (40)	
SUBTOTAL (100)	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_



# PROJECT MANAGEMENT EVENTS

- BUSINESS SOLUTIONS PROJECT **PMBS**
- CAREER DEVELOPMENT PROJECT **PMCD**
- COMMUNITY AWARENESS PROJECT **PMCA**
- COMMUNITY GIVING PROJECT **PMCG**
- FINANCIAL LITERACY PROJECT **PMFL**
- SALES PROJECT **PMSP**

The **Project Management Events** require participants to use project management skills to initiate, plan, execute, monitor and control, and close a project.

Participants in the Project Management Events will:

- identify a problem
- develop a project management plan related to the problem
- implement the project using project management skills
- develop a written report and presentation on the project

The project may begin at any time after the close of the previous year's chartered association conference and run to the beginning of the next chartered association conference.

The guidelines for each of the Project Management Events are consolidated to facilitate coordination of participant activities in each of the categories. This means the guidelines will be exactly the same for each category. However, each category will be treated separately as a competitive event. **Projects can only be submitted in one event category.**

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the category of project.

### BUSINESS MANAGEMENT + ADMINISTRATION

**Business Solutions** uses the project management process to work with a local business or organization to identify a specific problem with the current business operations and implement a solution. Examples include talent acquisition, employee on-boarding, policies and procedures, technology integration, customer service improvement, safety operations, marketing and promotion activities, and productivity and output enhancement.

**Career Development** uses the project management process to promote/educate the knowledge and skills needed for careers in marketing, finance, hospitality, management and entrepreneurship. Examples include career fairs, summer boot camps, professional dress seminars, résumé development workshops, career exploration initiatives, mock interviews, and career workplace re-entry and mentor programs.

**Community Awareness** uses the project management process to raise awareness for a community issue or cause. Examples include day of service, distracted driving, driving under the influence, bullying, disease awareness, mental health awareness, drug awareness, ethics, environmental and green issues, and vaping.

**Community Giving** uses the project management process to raise funds or collect donations to be given to a cause/charity. Examples include food bank donations, homeless shelter donations, 5K's, sports tournaments, auctions, banquets, item collections, holiday drives, adopt a families, etc.

**Financial Literacy** uses the project management process to promote the importance of financial literacy, including spending and saving, credit and debt, employment and income, investing, risk and insurance and financial decision making. Examples include organizing and implementing seminars for students (elementary, middle, high and post-secondary), tax preparation assistance, retirement planning and student loan workshops.

**Sales Project** uses the project management process to raise funds for the local DECA chapter. Examples include sports tournaments, t-shirt sales, 5K's, school merchandise sales, catalog sales, sponsorship development initiatives, fashion shows, pageants, restaurant nights, value cards and yearbook sales.

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## EVENT OVERVIEW

- The project consists of two major parts: the **written document** and the **oral presentation**. The written document will account for 60 points, and the oral presentation will account for the remaining 40 of the total 100 points.
- **One to three participants** may participate in the oral presentation. All participants must present the project to the judges.
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum **15 minutes** in length, including time for the judge's questions.
- The judge will evaluate the presentation, focusing on how the participants explain the use of project management skills, the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

## PROJECT ORIGINALITY

In many Project Management Events, chapters have settled on a strategy that uses the same well-developed projects year after year. Succeeding teams often take the previous year's successful project and seek to improve it. If that strategy works in achieving a chapter's goals and the experience teaches the principles of DECA, then the strategy serves the chapter, the community and DECA well.

Teams submitting entries for Project Management Events, however, should be challenged to do more than update the previous year's written project. Project committees should avoid even reviewing the previous year's entry. Judges (whose assignment is to evaluate a project according to established guidelines) will be impressed by the originality of a chapter's project.

Plagiarism of projects judged previously will automatically disqualify a chapter from competition and eligibility for awards.



1-3 PARTICIPANTS



20 PAGES  
ALLOWED



PRESENT PROJECT



15 MINUTES  
INTERVIEW TIME

# WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

NAME OF THE EVENT (one of the following):

- BUSINESS SOLUTIONS PROJECT
- CAREER DEVELOPMENT PROJECT
- COMMUNITY AWARENESS PROJECT
- COMMUNITY GIVING PROJECT
- FINANCIAL LITERACY PROJECT
- SALES PROJECT

Name of high school

School address

City, State/Province, ZIP/Postal Code

Names of participants

Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

## I. EXECUTIVE SUMMARY

One- to three-page description of the project

## II. INITIATING

- A. Statement of the problem
- B. Project scope — brief description of the project (purpose, rationale and expected benefits)

## III. PLANNING AND ORGANIZING

- A. Project goals
- B. Human resource management plan — team member roles, skills and strengths and responsibilities
- C. Schedule
  - i. Milestone — describe the 2-4 major milestones (activities) needed to accomplish
  - ii. Timeline to reach each milestone
- D. Quality management plan — key metrics
- E. Risk management plan — potential issues, potential impact of the issue and response strategy
- F. Proposed project budget — include both monetary and in-kind donations when applicable

## IV. EXECUTION

Description and documentation of the project plan implementation

## V. MONITORING AND CONTROLLING

- A. Monitoring — describe how you monitored your schedule, budget and project quality
- B. Controlling — list issues encountered and how you dealt with them

## VI. CLOSING THE PROJECT

- A. Evaluation of key metrics
- B. Lessons learned — describe what worked well and what didn't work well for each of the project management processes: initiating, planning and organizing, execution, monitoring and controlling
- C. Recommendations for future projects

## VII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

## VIII. APPENDIX

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- Prior to the presentation, a judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants have assumed the roles of project managers.
- The participants will present the plan to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry to use as reference during the presentation.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you.

At the beginning of the presentation (after introductions), the participants will describe the project. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 40 points.



# PROJECT MANAGEMENT EVENTS

- BUSINESS SOLUTIONS PROJECT **PMBS**
- CAREER DEVELOPMENT PROJECT **PMCD**
- COMMUNITY AWARENESS PROJECT **PMCA**
- COMMUNITY GIVING PROJECT **PMCG**
- FINANCIAL LITERACY PROJECT **PMFL**
- SALES PROJECT **PMSP**

## WRITTEN ENTRY EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One- to three-page description of the project	0-1-2-3	4-5-6	7-8	9-10	
INITIATING	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Statement of the problem and project scope	0-1	2-3	4	5	
PLANNING AND ORGANIZING	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
3. Project goals, human resource management plan, schedule, quality management plan, risk management plan, proposed project budget	0-1-2-3-4	5-6-7-8	9-10-11-12	13-14-15-16	
EXECUTION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
4. Description and documentation of the project plan implementation	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
MONITORING AND CONTROLLING	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Monitoring schedule, budget and project quality; issues and how you dealt with them	0-1	2	3	4	
CLOSING THE PROJECT	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. Evaluation of key metrics, lessons learned, recommendations for future projects	0-1-2	3-4	5-6	7-8	
APPEARANCE AND WORD USAGE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Professional layout, neatness, proper grammar, spelling and word usage	0	1	2	3	
<b>WRITTEN ENTRY TOTAL POINTS (60)</b>					

JUDGE \_\_\_\_\_



# PROJECT MANAGEMENT EVENTS

- BUSINESS SOLUTIONS PROJECT **PMBS**
- CAREER DEVELOPMENT PROJECT **PMCD**
- COMMUNITY AWARENESS PROJECT **PMCA**
- COMMUNITY GIVING PROJECT **PMCG**
- FINANCIAL LITERACY PROJECT **PMFL**
- SALES PROJECT **PMSP**

## PRESENTATION EVALUATION FORM

TO WHAT EXTENT DID THE PARTICIPANTS:	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Explain the project?	0-1	2-3	4	5	
2. Provide rationale for the project?	0-1	2-3	4	5	
3. Apply project management tools to complete the project?	0-1-2-3	4-5-6	7-8	9-10	
4. Evaluate project results?	0-1-2-3	4-5-6	7-8	9-10	

GENERAL	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Professional standards (organization, clarity and effectiveness of the presentation); effective use of visuals, appearance, poise, confidence, participation of all	0-1-2-3	4-5-6	7-8	9-10	

<b>PRESENTATION TOTAL POINTS (40)</b>	
WRITTEN ENTRY (60)	
PRESENTATION (40)	
SUBTOTAL (100)	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_

# DECA

## INNOVATION PLAN

### INNOVATION PLAN EIP

*Sponsored by the Savannah College of Art and Design (SCAD)*

The **Innovation Plan** involves the idea generation and opportunity recognition needed to take advantage of market opportunities to introduce a new business, product or service. Any type of business, product or service may be used.

Participants in the Innovation Plan will:

- prepare a brief concept paper
- present the opportunity that exists in the marketplace and how their innovation will meet the needs of consumers

## ENTREPRENEURSHIP

### EVENT OVERVIEW

- This event consists of a **concept paper** and the **oral presentation**.
- Each event entry will be composed of **one to three members** of a DECA chapter. All participants must present the project to the judges. All participants present must respond to questions.
- The body of the written entry must be limited to **10 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participant responds to questions that the judge may ask during the presentation.

### KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.



## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

- INNOVATION PLAN
- Name of high school
- School address
- City, State/Province, ZIP/Postal Code
- Names of participants
- Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered "1" and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One-page summary of the business model

### II. PROBLEM

Describe the top problems the product/service is addressing.

### III. CUSTOMER SEGMENTS

Who are the target customers?

### IV. UNIQUE VALUE PROPOSITION

What is the single, clear, compelling message that states why the product/service is innovative and satisfies a market need?

### V. SOLUTION

Describe the top features of your product/service that solve the problem.

### VI. CONCLUSION

Summary of key points and feasibility of the business venture

### VII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

### VIII. APPENDIX

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.



1-3 PARTICIPANTS



10 PAGES  
ALLOWED



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- Prior to the presentation, the judge will review the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants will present the project to the judge in a 15-minute presentation worth 100 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you. You are role-playing a venture capitalist who is determining if the concept is viable to satisfy a market need and is worthy of further exploration for feasibility. You may refer to the written entry, or to notes, during the presentation.

At the beginning of the presentation (after introductions), the participants will describe the proposal and the feasibility of the business venture. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry itself (to which you may refer during the presentation).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 100 points.



# DECA

## INNOVATION PLAN

INNOVATION PLAN EIP

### EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One-page summary of the business model	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14-15	16-17-18-19-20	
PROBLEM	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Description of the top problems the product/service is addressing	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
CUSTOMER SEGMENTS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
3. Description of target customers	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
UNIQUE VALUE PROPOSITION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
4. Description of the single, clear, compelling message that states why the product/service is innovative and satisfies a market need	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
SOLUTION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Description of the top features of the product/service that solve the problem	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
CONCLUSION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. Summary of key points and feasibility of the business venture	0-1-2-3-4	5-6-7-8	9-10-11	12-13-14	
GENERAL	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Professional standards (appearance, poise, confidence), presentation technique, effective use of visuals and participation of all	0-1-2-3	4-5-6	7-8	9-10	

<b>PRESENTATION TOTAL POINTS (100)</b>	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_



# START-UP BUSINESS PLAN

## START-UP BUSINESS PLAN ESB

The **Start-Up Business Plan** involves the development of a proposal to form a business. Any type of business may be used.

Participants in the Start-Up Business Plan will:

- prepare a business plan proposal
- present the proposal as a pitch to a potential source of capital in a role-playing interview

## ENTREPRENEURSHIP

### EVENT OVERVIEW

- This event consists of the **business plan proposal** describing a business the participants want to develop and the **oral presentation**.
- Each event entry will be composed of **one to three members** of a DECA chapter. All participants must present the project to the judges. All participants present must respond to questions.
- The body of the written entry must be limited to **10 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

### KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

START-UP BUSINESS PLAN

Name of high school

School address

City, State/Province, ZIP/Postal Code

Name of participants

Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered "1" and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form.

Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One-page summary of the business model

### II. PROBLEM

Describe the top problems the product/service is addressing.

### III. CUSTOMER SEGMENTS

Who are the target customers?

### IV. UNIQUE VALUE PROPOSITION

What is the single, clear, compelling message that states why the product/service is different and worth buying?

### V. SOLUTIONS

Describe the top features of the product/service that solve the problem.

### VI. CHANNELS

What are the pathways to customers?

### VII. REVENUE STREAMS

What is the revenue model and what are the lifetime values? What is the revenue and the gross margin?

### VIII. COST STRUCTURE

What are the customer acquisition costs, distribution costs, human resources costs and other additional costs?

### IX. KEY METRICS

What are the key activities that must be measured?

### X. COMPETITIVE ADVANTAGE

What about the product/service means that it cannot be easily copied or bought?

### XI. CONCLUSION

Specific request for financing, summary of key points supporting the financial request

### XII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

### XIII. APPENDIX

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.



1-3 PARTICIPANTS



10 PAGES  
ALLOWED



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- The major emphasis of the proposal is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants will present the business plan proposal to the judge in a 15-minute presentation worth 100 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant.
- Each participant may bring a copy of the business plan proposal or note cards pertaining to the proposal and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

The participants will make a 15-minute presentation to you. As the judge, you are to assume the role of a potential source of capital for the business. You may refer to the written entry, or to notes, during the presentation.

At the beginning of the presentation (after introductions), the participants will present the proposal. Allow the participants to complete this portion without interruption, unless you are asked to respond.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry itself (to which you may refer during the presentation).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



# START-UP BUSINESS PLAN

START-UP BUSINESS PLAN ESB

## EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One-page summary of the business model	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14-15	16-17-18-19-20	
PROBLEM	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Description of the top problems the product/service is addressing	0-1-2	3-4-5	6-7-8	9	
CUSTOMER SEGMENTS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
3. Description of target customers	0-1-2	3-4-5	6-7	8	
UNIQUE VALUE PROPOSITION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
4. Description of the single, clear, compelling message that states the unique value proposition	0-1-2	3-4-5	6-7	8	
SOLUTIONS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Description of the top features of the product/service that solve the problem	0-1-2	3-4-5	6-7-8	9	
CHANNELS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. Descriptions of the pathways to customers	0-1-2	3-4-5	6-7	8	
REVENUE STREAMS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Description of the revenue model and life time values; explanation of the revenue and gross margin	0-1-2	3-4-5	6-7-8	9	
COST STRUCTURE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
8. Explanation of the customer acquisition costs, distribution costs, human resources costs and other additional costs	0-1-2	3-4-5	6-7-8	9	
KEY METRICS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
9. Explanation of the key activities that must be measured	0-1-2	3-4-5	6-7	8	
COMPETITIVE ADVANTAGE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
10. Explanation of why the product/service cannot be easily copied or bought	0-1-2	3-4-5	6-7-8	9	
CONCLUSION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
11. Specific request for financing, summary of key points supporting the financial request	0	1	2	3	

<b>TOTAL POINTS (100)</b>	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_



# INDEPENDENT BUSINESS PLAN

## INDEPENDENT BUSINESS PLAN EIB

The **Independent Business Plan** involves the development of a comprehensive proposal to start a new business. Any type of business may be used.

Participants in the Independent Business Plan will:

- prepare a written proposal for a new business
- request financing for the proposal in a role-playing interview with a bank or venture capital official

## ENTREPRENEURSHIP

### EVENT OVERVIEW

- This event consists of two major parts: the **written document** and the **oral presentation**. The written document will account for 60 points, and the oral presentation will account for the remaining 40 of the total 100 points.
- Each event entry will be composed of **one to three members** of a DECA chapter. All participants must present the project to the judge. All participants present must respond to questions.
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum **15 minutes** in length, including time for the judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

### KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.



## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

**INDEPENDENT BUSINESS PLAN**

- Name of high school
- School address
- City, State/Province, ZIP/Postal Code
- Names of participants
- Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

**I. EXECUTIVE SUMMARY**

One- to three-page description of the business model

**II. PROBLEM**

Describe the top problems the product/service is addressing.

**III. CUSTOMER SEGMENTS**

Who are the target customers?

**IV. UNIQUE VALUE PROPOSITION**

What is the single, clear, compelling message that states why the product/service is different and worth buying?

**V. SOLUTION**

Describe the top features of the product/service that solve the problem.

**VI. CHANNELS**

What are the pathways to customers?

**VII. REVENUE STREAMS**

What is the revenue model and what are the lifetime values?

**VIII. COST STRUCTURE**

What are the customer acquisition costs, distribution costs, human resources costs and other additional costs?

**IX. DETAILED FINANCIALS**

- A. Projected income and expenses (The following items are recommended for inclusion. You may select the appropriate items for your business.)
- Projected income statements by month for the first year’s operation (sales, expenses, profit loss)
  - Projected cash flow by month for the first year’s operation
  - Projected balance sheet, end of first year
  - Projected three-year plan
  - A brief narrative description of the planned growth of the proposed business, including financial resources and needs
- B. Proposed plan to meet capital needs (The following are recommended for inclusion. You may select the appropriate items for your business.)
- Personal and internal sources
  - Earnings, short-term and long-term borrowing, long-term equity
  - External sources
  - Plan to repay borrowed funds or provide return on investment to equity funds



1-3 PARTICIPANTS



20 PAGES  
ALLOWED



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

**X. KEY METRICS**

What are the key activities that must be measured?

**XI. COMPETITIVE ADVANTAGE**

What about the product/service means that it cannot be easily copied or bought?

**XII. CONCLUSION**

Specific request for financing, summary of key points supporting the financial request

**XIII. BIBLIOGRAPHY**

A bibliography is required. Include a list of the sources of information used in the written document.

**XIV. APPENDIX**

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- Prior to the presentation, a judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants, assuming the role of entrepreneurs, will have prepared a detailed comprehensive proposal to start a new business. The role of the judge is that of a potential source of capital for the business who evaluates as if actually going to approve (or disapprove) the request for financing.
- The participants will present the business plan proposal to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you. You are role-playing a loan officer or venture capitalist.

At the beginning of the presentation (after introduction), the participants will describe the proposal and make the request for financing. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 40 points.



# INDEPENDENT BUSINESS PLAN

INDEPENDENT BUSINESS PLAN EIB

## WRITTEN ENTRY EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One- to three-page description of the business model	0-1-2-3	4-5-6	7-8	9-10	
PROBLEM	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Description of the top problems the product/service is addressing	0-1	2	3	4	
CUSTOMER SEGMENTS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
3. Description of target customers	0-1	2	3	4	
UNIQUE VALUE PROPOSITION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
4. Description of the single, clear, compelling message that states the unique value proposition	0-1	2	3	4	
SOLUTION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Description of the top features of the product/service that solve the problem	0-1	2	3	4	
CHANNELS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. Descriptions of the pathways to customers	0-1	2	3	4	
REVENUE STREAM	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Description of the revenue model and life time values	0-1	2	3	4	
COST STRUCTURE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
8. Explanation of the customer acquisition costs, distribution costs, human resources costs and any additional costs	0-1	2	3	4	
DETAILED FINANCIALS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
9. Projected income and expenses and proposed plan to meet capital needs	0-1-2-3	4-5-6	7-8	9-10	
KEY METRICS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
10. Explanation of the key activities that must be measured	0-1	2	3	4	
COMPETITIVE ADVANTAGE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
11. Explanation of why the product/service cannot be easily copied or bought	0-1	2	3	4	
CONCLUSION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
12. Specific request for financing, summary of key points supporting the financial request	0-1	2	3	4	

**WRITTEN ENTRY TOTAL POINTS (60)**

JUDGE \_\_\_\_\_



# INDEPENDENT BUSINESS PLAN

INDEPENDENT BUSINESS PLAN EIB

## PRESENTATION EVALUATION FORM

PRESENTATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Opening presentation and request: description of the business model; organization, clarity and effectiveness of the presentation	0-1	2-3	4	5	

TO WHAT EXTENT DID THE PARTICIPANTS:	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Assess opportunities for venture creation	0-1	2-3	4	5	
3. Determine feasibility of venture ideas	0-1	2-3	4	5	
4. Assess start-up requirements	0-1	2-3	4	5	
5. Evaluate risk-taking opportunities	0-1	2-3	4	5	
6. Explain the complexity of business operations	0-1	2-3	4	5	
7. Determine relationships among total revenue, marginal revenue, output and profit	0-1	2-3	4	5	
8. Describe marketing functions and related activities	0-1	2-3	4	5	

<b>PRESENTATION TOTAL POINTS (40)</b>	
WRITTEN ENTRY (60)	
PRESENTATION (40)	
SUBTOTAL (100)	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_



# INTERNATIONAL BUSINESS PLAN

## INTERNATIONAL BUSINESS PLAN IBP

The **International Business Plan** involves the development of a proposal to start a new business venture in an international setting. It may be a new business or a new product or service of an existing business. Any type of business may be used.

Participants in the International Business Plan will:

- apply entrepreneurship knowledge and skills in an international setting
- prepare a written proposal for a new business venture
- present the proposal in a role-playing interview

## ENTREPRENEURSHIP

### EVENT OVERVIEW

- This event consists of two major parts: the **written document** and the **oral presentation**. The written document will account for 60 points, and the oral presentation will account for the remaining 40 of the total 100 points.
- Each event entry will be composed of **one to three members** of the DECA chapter. All participants must present the project to the judge. All participants must respond to questions.
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

INTERNATIONAL BUSINESS PLAN

Name of high school

School address

City, State/Province, ZIP/Postal Code

Names of participants

Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form.

Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One- to three-page summary of the business model

### II. ANALYSIS OF THE INTERNATIONAL BUSINESS SITUATION

- A. Economic, governmental and legal analysis of the trading country
  - 1. Describe the trading country’s economic system, economic information important to your proposed business/product/service, the level of foreign investment in that country
  - 2. Describe the trading country’s governmental structure and stability, how the government controls trade and private business
  - 3. Describe laws and/or governmental agencies that affect your business/product/service [i.e., labor laws, trade laws (origin country and the country of choice)]
- B. Trade area and cultural analysis
  - 1. Geographic and demographic information, important customs and traditions, other pertinent cultural information, competitive advantages and disadvantages of the proposed product and/or service
  - 2. Analysis of the potential location—importance and requirements of each trade document required by the origin country and the country of choice

### III. PROBLEM

Describe the top problems the product/service is addressing.

### IV. CUSTOMER SEGMENTS

Who are the target customers? Describe the target market (age, income level, population estimate, other specific demographic and economic information), customer buying behavior related to the proposed product and/or service

### V. UNIQUE VALUE PROPOSITION

What is the single, clear, compelling message that states why your product/service is different and worth buying?

### VI. SOLUTION

What are the top features of the product/service that solve the problem?

### VII. CHANNELS

What are the pathways to customers?

### VIII. REVENUE STREAMS

What is the revenue model and what are the lifetime values?

### IX. COST STRUCTURE

What are the customer acquisition costs, distribution costs, human resources costs, and other additional costs?



1-3 PARTICIPANTS



20 PAGES  
ALLOWED



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

## **X. DETAILED FINANCIALS**

- A. Projected income and expenses (The following items are recommended for inclusion. You may select the appropriate items for your business.)
- Projected income statements by month for the first year's operation (sales, expenses, profit/loss)
  - Projected cash flow for the first year
  - Projected cash flow by month for the first year's operation
  - Projected balance sheet, end of first year
  - Projected three-year plan
  - A brief narrative description of the planned growth of the proposed business, including financial resources and needs
- B. Proposed plan to meet capital needs (The following are recommended items for inclusion. You may select the appropriate items for your business.)
- Personal and internal sources
  - Earnings, short-term and long-term borrowing, long-term equity
  - External sources
  - Plan to repay borrowed funds or provide return on investment to equity funds

## **XI. KEY METRICS**

What are the key activities that must be measured?

## **XII. COMPETITIVE ADVANTAGE**

What about the product/service means that it cannot be easily copied or bought?

## **XIII. CONCLUSION**

Specific request for financing, summary of key points supporting the financial request

## **XIV. BIBLIOGRAPHY**

A bibliography is required. Include a list of the sources of information used in the written document.

## **XV. APPENDIX**

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.



## PENALTY POINT CHECKLIST

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## PRESENTATION GUIDELINES

- Prior to the presentation, a judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants have been asked to prepare a proposal for a new business venture in an international setting.
- Playing the role of a business executive, the judge will evaluate the written document and then interview the participants, as if he/she were actually going to approve (or disapprove) the proposal.
- The participants will present the plan to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## PRESENTATION JUDGING

Participants will make a 15-minute presentation to you. You are role-playing a business executive.

At the beginning of the presentation (after introductions), the participants will describe the proposal and make the request for approval. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 40 points.



# INTERNATIONAL BUSINESS PLAN

INTERNATIONAL BUSINESS PLAN IBP

## WRITTEN ENTRY EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One- to three-page description of the business model	0-1-2-3	4-5-6	7-8	9-10	
ANALYSIS OF THE INTERNATIONAL BUSINESS SITUATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Description of economic, political and legal analysis; trade area and cultural analysis	0-1	2	3	4	
PROBLEM	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
3. Description of the problems the product/service is addressing	0-1	2	3	4	
CUSTOMER SEGMENTS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
4. Description of target customers	0-1	2	3	4	
UNIQUE VALUE PROPOSITION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Description of the single, clear, compelling message that states the unique value proposition	0-1	2	3	4	
SOLUTION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. Description of the top features of the product/service that solve the problem	0-1	2	3	4	
CHANNELS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Descriptions of the pathways to customers	0-1	2	3	4	
REVENUE STREAM	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
8. Description of the revenue model and lifetime values	0-1	2	3	4	
COST STRUCTURE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
9. Explanation of the customer acquisition costs, distribution costs, human resources costs and any additional costs	0-1	2-3	4	5	
DETAILED FINANCIALS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
10. Projected income and expenses and proposed plan to meet capital needs	0-1	2-3	4	5	
KEY METRICS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
11. Explanation of the key activities that must be measured	0-1	2	3	4	
COMPETITIVE ADVANTAGE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
12. Explanation of why the product/service cannot be easily copied or bought	0-1	2	3	4	
CONCLUSION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
13. Specific request for financing, summary of key points supporting the financial request	0-1	2	3	4	

**WRITTEN ENTRY TOTAL POINTS (60)**

JUDGE \_\_\_\_\_



# INTERNATIONAL BUSINESS PLAN

INTERNATIONAL BUSINESS PLAN IBP

## PRESENTATION EVALUATION FORM

PRESENTATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Opening presentation and request: description of the business model; organization, clarity and effectiveness of the presentation	0-1	2-3	4	5	

TO WHAT EXTENT DID THE PARTICIPANTS:	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Assess opportunities for venture creation	0-1	2-3	4	5	
3. Determine feasibility of venture ideas	0-1	2-3	4	5	
4. Describe market-entry strategies for conducting business internationally	0-1	2-3	4	5	
5. Evaluate risk-taking opportunities	0-1	2-3	4	5	
6. Explain the complexity of business operations	0-1	2-3	4	5	
7. Determine relationships among total revenue, marginal revenue, output and profit	0-1	2-3	4	5	
8. Describe marketing functions and related activities	0-1	2-3	4	5	

<b>PRESENTATION TOTAL POINTS (40)</b>	
WRITTEN ENTRY (60)	
PRESENTATION (40)	
SUBTOTAL (100)	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_



# BUSINESS GROWTH PLAN

## BUSINESS GROWTH PLAN EBG

The **Business Growth Plan** involves strategy development needed to grow an existing business owned by a current DECA member. Options may include franchising, expanding into new markets, opening a second location, licensing agreements, merging with or acquiring another business, diversifying product lines, forming strategic alliances with other businesses, expanding to the internet, etc.

Participants in the Business Growth Plan will:

- analyze their current business operations
- prepare a written proposal identifying opportunities to grow and expand the business
- present the proposal in a role-playing interview

**All participants must be documented owners/operators of the business.** A parents' business does not qualify.

Examples of sufficient documentation of ownership include items that clearly list the name(s) of the owner(s)/operator(s) such as:

- notarized affidavit of ownership
- business licenses
- certificates of insurance
- tax filings
- local business permits

Examples of insufficient documentation of ownership include items that are less official such as:

- webpages
- business cards
- promotional materials

## ENTREPRENEURSHIP

### EVENT OVERVIEW

- This event consists of two major parts: the **written document** and the **oral presentation**. The written document will account for 60 points, and the oral presentation will account for the remaining 40 of the total 100 points.
- Each event entry will be composed of **one to three members** of the DECA chapter. All participants must present the project to the judge. All participants present must respond to questions. **All participants must be documented owners/operators of the business.**
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the proof of ownership documentation, title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

### KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

BUSINESS GROWTH PLAN

Name of high school

School address

City, State/Province, ZIP/Postal Code

Names of participants

Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered "1" and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One- to three-page description of the plan

### II. INTRODUCTION

- Type of business owned and operated and a description of the current business operations
- Products and/or services offered
- Unique characteristics of the business

### III. SWOT ANALYSIS

- Strengths of the business
- Weaknesses of the business
- Opportunities available for the business
- Threats to the business

### IV. FIVE YEAR PLAN TO GROW AND EXPAND THE BUSINESS

- Expansion opportunities
- New market analysis
- Marketing plan

### V. FINANCING PLAN

- Current financial situation, including financial documents
- Fixed overhead and cost of operations
- Capital needed for expansion opportunities
- Time to achieve profitability

### VI. CONCLUSION

Summary of key points

### VII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

### VIII. APPENDIX

An appendix is optional. If additional material is appended, all pages must be numbered as noted previously. Include in an appendix any exhibits appropriate to the written entry, but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

#### PROOF OF OWNERSHIP DOCUMENT (REQUIRED)

Documentation to verify student ownership/operation. Pages in this section do not count towards the 20 numbered pages. Do not number these pages. **All participants must be documented owners/operators of the business.**



1-3 PARTICIPANTS



20 PAGES  
ALLOWED  
Plus Proof of Ownership



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- Prior to the presentation, a judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants will present the project to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you.

At the beginning of the presentation (after introduction), the participant will describe the proposal and make the request for financing. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the presentation is 40 points.



# BUSINESS GROWTH PLAN

BUSINESS GROWTH PLAN EBG

## WRITTEN ENTRY EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One- to three-page description of the plan	0-1-2-3	4-5-6	7-8	9-10	

INTRODUCTION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Type of business owned and operated and description of the current business operations	0	1	2	3	
3. Description of the products and/or services offered	0	1	2	3	
4. Unique characteristics of the business	0	1	2	3	

SWOT ANALYSIS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Strengths of the business	0	1	2	3	
6. Weaknesses of the business	0	1	2	3	
7. Opportunities available for the business	0	1	2	3	
8. Threats to the business	0	1	2	3	

FIVE YEAR PLAN TO GROW & EXPAND THE BUSINESS	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
9. Expansion opportunities	0-1	2	3	4	
10. New market analysis	0-1	2	3	4	
11. Marketing plan	0	1	2	3	

FINANCING PLAN	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
12. Current financial situation	0	1	2	3	
13. Fixed overhead and cost of operations	0	1	2	3	
14. Capital needed for expansion opportunities	0	1	2	3	
15. Time to achieve profitability	0	1	2	3	

CONCLUSION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
16. Summary of key points	0	1	2	3	

APPEARANCE AND WORD USAGE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
17. Professional layout, neatness, proper grammar, spelling and word usage	0	1	2	3	

**WRITTEN ENTRY TOTAL POINTS (60)** \_\_\_\_\_

JUDGE \_\_\_\_\_



# BUSINESS GROWTH PLAN

BUSINESS GROWTH PLAN EBG

## PRESENTATION EVALUATION FORM

PRESENTATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Opening presentation; description of the plan; organization, clarity and effectiveness of the presentation	0-1-2	3-4	5-6	7-8	

TO WHAT EXTENT DID THE PARTICIPANTS:	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Create processes for ongoing opportunity recognition	0-1-2	3-4	5-6	7-8	
3. Develop plan to invest resources into improving current products or creating new ones	0-1-2	3-4	5-6	7-8	
4. Assess risks associated with the venture	0-1-2	3-4	5-6	7-8	
5. Determine relationships among total revenue, marginal revenue, output and profit	0-1-2	3-4	5-6	7-8	

<b>PRESENTATION TOTAL POINTS (40)</b>	
WRITTEN ENTRY (60)	
PRESENTATION (40)	
SUBTOTAL (100)	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE: \_\_\_\_\_





# FRANCHISE BUSINESS PLAN

## FRANCHISE BUSINESS PLAN EFB

The **Franchise Business Plan** involves the development of a comprehensive business plan proposal to buy into an existing franchise.

Participants in the Franchise Business Plan will:

- prepare a written proposal for becoming a franchisee
- present the proposal in a role-playing interview

## ENTREPRENEURSHIP

### EVENT OVERVIEW

- This event consists of two major parts: the **written document** and the **oral presentation**. The written document will account for 60 points, and the oral presentation will account for the remaining 40 of the total 100 points.
- Each event entry will be composed of **one to three members** of the DECA chapter. All participants must present the project to the judge. All participants must respond to questions.
- The body of the written entry must be limited to **20 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the presentation.

### KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

**FRANCHISE BUSINESS PLAN**

- Name of high school
- School address
- City, State/Province, ZIP/Postal Code
- Names of participants
- Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered "1" and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One- to three-page summary of the business model

### II. BUSINESS HISTORY, BACKGROUND AND OBJECTIVES

- A. Describe the company for you wish to purchase franchise rights
- B. List your short-term (next 12 months) and long term objectives
- C. Describe the company's major successes and achievements to date
- D. Describe the company's challenges and obstacles
- E. Describe the requirements to franchise

### III. BUSINESS ENVIRONMENT

Describe how environmental factors such as the local, national, or international economy, changes in population, interest rates, changes in levels of employment, etc. may affect your business

### IV. PRODUCTS AND/OR SERVICES

- A. List and describe the products and/or services offered

### V. PRESENT MARKET

- A. Describe the present market (geographic location of your potential customers, types of customers)
- B. Describe the growth potential in your market
- C. Describe the current pricing policy
- D. If the business is seasonal, explain how the company adjusts to seasonal factors

### VI. COMPETITION

- A. List the company's primary competitors in your market. Identify their strengths and weaknesses
- B. List the advantages the company has compared to its primary competitors
- C. List the disadvantages the company has compared to its primary competitors

### VII. MARKETING PLAN

- A. Describe the company's existing marketing techniques, strategies and tools
- B. Describe the marketing techniques, strategies, and tools you will use in the future to promote the business



1-3 PARTICIPANTS



20 PAGES  
ALLOWED



PRESENT PLAN



15 MINUTES  
INTERVIEW TIME

## **VIII. MANAGEMENT AND ORGANIZATION**

- A. Describe your management team and its strengths and weaknesses
- B. Describe your plan to further develop your management team
- C. Describe your management succession plan—who will take over in the event of the incapacity or continued absence of any owner or key employee?
- D. Describe the need for, and how you will obtain, additional management personnel based on present and projected sales

## **IX. BUSINESS RESOURCES**

- A. List the major operating equipment that you will purchase or lease
- B. List major suppliers, location and payment terms
- C. Identify other outside resources used or needed to fulfill customer requirements
- D. Describe quality control procedures
- E. Describe the availability of skilled labor to meet your company needs
- F. Describe the type and extent of necessary training that will be required to upgrade the skills of labor and administrative employees and the estimated cost
- G. Projected number of full-time and part-time employees
- H. Organizational chart

## **X. FINANCIAL PLAN AND DATA**

- A. Describe the company's sales and profit trends
- B. Outline your strategy and timing for obtaining capital
- C. Two-year projected operating statement
- D. One-year projected cash flow statement

## **XI. CONCLUSION**

Specific request for financing, summary of key points supporting the financial request

## **XII. BIBLIOGRAPHY**

A bibliography is required. Include a list of the sources of information used in the written document.

## **XIII. APPENDIX**

An appendix is optional. Include in the appendix any exhibits appropriate to the written entry but not important enough to include in the body; these might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- Prior to the presentation, a judge will evaluate the written portion of the entry. The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants will present the project to the judge in a 15-minute presentation worth 40 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the proposal.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you. As the judge, you are to assume the role of a potential source of capital for the business.

At the beginning of the presentation (after introductions), the participants will present the proposal. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry (if provided).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 40 points.



# FRANCHISE BUSINESS PLAN

FRANCHISE BUSINESS PLAN EFB

## WRITTEN ENTRY EVALUATION FORM

Please refer to the **Written Entry Guidelines** for a more detailed explanation of these items.

EXECUTIVE SUMMARY	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. One- to three-page description of the business model	0-1-2-3	4-5-6	7-8	9-10	
BUSINESS HISTORY, BACKGROUND AND OBJECTIVE	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Description of the company, objectives, company successes and challenges and requirements to franchise	0-1	2-3	4	5	
BUSINESS ENVIRONMENT	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
3. Description of how environmental factors may affect the business	0-1	2-3	4	5	
PRODUCTS AND/OR SERVICES	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
4. List of and descriptions of the products and/or services offered	0-1	2-3	4	5	
PRESENT MARKET	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
5. Description of the present market, growth potential and pricing policy	0-1	2-3	4	5	
COMPETITION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
6. List of the company's primary competitors in the market and identification of their strengths and weaknesses	0-1	2-3	4	5	
MARKETING PLAN	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
7. Description of existing and future marketing techniques and strategies	0-1	2-3	4	5	
MANAGEMENT AND ORGANIZATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
8. Description of the management team, management team development plan, succession plan, and the need for additional personnel	0-1	2-3	4	5	
BUSINESS RESOURCES	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
9. Identified major operating equipment, major suppliers, payment terms, outside resources, quality control procedures, availability of skilled labor, training needs, number of full-time and part-time employees, and developed an organizational chart	0-1	2-3	4	5	
FINANCIAL PLAN AND DATA	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
10. • Description of the company's sales and profit trends • Outline of strategy and timing for obtaining capital • Two-year projected operating statement • One-year projected cash flow statement	0-1	2-3	4	5	
CONCLUSION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
11. Specific request for financing, summary of key points supporting the financial request	0-1	2-3	4	5	

**WRITTEN ENTRY TOTAL POINTS (60)** \_\_\_\_\_

JUDGE \_\_\_\_\_



# FRANCHISE BUSINESS PLAN

FRANCHISE BUSINESS PLAN EFB

## PRESENTATION EVALUATION FORM

PRESENTATION	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Opening presentation; description of the plan; organization, clarity and effectiveness of the presentation	0-1	2-3	4	5	

TO WHAT EXTENT DID THE PARTICIPANTS:	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
2. Assess opportunities for venture creation	0-1	2-3	4	5	
3. Determine feasibility of venture ideas	0-1	2-3	4	5	
4. Assess start-up requirements	0-1	2-3	4	5	
5. Evaluate risk-taking opportunities	0-1	2-3	4	5	
6. Explain the complexity of business operations	0-1	2-3	4	5	
7. Determine relationships among total revenue, marginal revenue, output and profit	0-1	2-3	4	5	
8. Describe marketing functions and related activities	0-1	2-3	4	5	

<b>PRESENTATION TOTAL POINTS (40)</b>	
WRITTEN ENTRY (60)	
PRESENTATION (40)	
SUBTOTAL (100)	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE: \_\_\_\_\_



# INTEGRATED MARKETING CAMPAIGN EVENTS

INTEGRATED MARKETING CAMPAIGN—EVENT **IMCE**

INTEGRATED MARKETING CAMPAIGN—PRODUCT **IMCP**

INTEGRATED MARKETING CAMPAIGN—SERVICE **IMCS**

The **Integrated Marketing Campaign Events** provide an opportunity for the participants to demonstrate promotional knowledge and skills needed by marketing personnel.

Participants in the Integrated Marketing Campaign Events will:

- develop an integrated marketing campaign of no more than 45 days in length for a real event, product, or service
- present the campaign in a role-play situation to a prospective client/advertiser

The guidelines for each of the Integrated Marketing Campaign Events are consolidated to facilitate coordination of participant activities in each of the campaign categories. This means the guidelines will be exactly the same for each campaign category. However, each campaign category will be treated separately as a competitive event.

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the category of campaign.

### MARKETING

**Integrated Marketing Campaign—Event** includes a campaign that is related to any sports and entertainment event and/or company event. Examples include concerts, festivals, fairs, tournaments, pet adoption day, charity events, etc.

**Integrated Marketing Campaign—Product** includes a campaign that is related to any hard/soft line retail products including e-commerce. Examples include apparel and accessories, retail products, etc.

**Integrated Marketing Campaign—Service** includes a campaign that is related to any service or intangible product. Examples may include pet services, golf lessons, health care services, salons, restaurants, amusement parks, etc.

## EVENT OVERVIEW

- This event consists of the **written document**, the **cluster exam** and the **oral presentation**. The maximum score for the written entry and presentation evaluation is 100 points. The combined written entry and presentation score will be weighted twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.
- Each event entry will be composed of **one to three members** of the DECA chapter. All participants must present the campaign to the judge. All participants must respond to questions.
- Each participant will be given a 100-question, multiple-choice, **cluster exam** testing knowledge of the Business Administration Core performance indicators and the Marketing Cluster performance indicators. In the case of team entries, the scores of each participant will be averaged to produce a single team score.
- The body of the written entry must be limited to **10 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation focusing on the effectiveness of public speaking and presentation skills, how well the participants respond to questions that the judge may ask during the presentation.

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

NAME OF THE EVENT (one of the following):

- INTEGRATED MARKETING CAMPAIGN–EVENT
- INTEGRATED MARKETING CAMPAIGN–PRODUCT
- INTEGRATED MARKETING CAMPAIGN–SERVICE

Name of high school

School address

City, State/Province, ZIP/Postal Code

Names of participants

Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

This outline must be followed. Points for each section are included on the Written Entry Evaluation Form. Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One-page description of the campaign which should be no more than 45 days in length

### II. DESCRIPTION OF THE EVENT, PRODUCT OR SERVICE

### III. CAMPAIGN OBJECTIVES

### IV. CAMPAIGN TARGET MARKET

### V. CAMPAIGN ACTIVITIES AND SCHEDULE

Include creative samples of marketing pieces suggested

### VI. BUDGET

Detailed projections of actual cost

### VII. KEY METRICS

Key performance indicators that will be used to measure the success of the campaign

### VIII. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

### IX. APPENDIX

An appendix is optional. Include in an appendix any exhibits appropriate to the written entry but not important enough to include in the body.



1-3 PARTICIPANTS



MARKETING  
CLUSTER EXAM



10 PAGES  
ALLOWED



PRESENT CAMPAIGN



15 MINUTES  
INTERVIEW TIME



## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- The major emphasis of the written entry is on the content. Drawings, illustrations and graphic presentations (where allowed) will be judged for clarity, not artistic value.
- The participants will present to the judge in a 15-minute presentation worth 100 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant. Each participant must take part in the presentation.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the campaign.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you. As the judge, you are to assume the role of a client who will assess the participants' campaign proposals. You may refer to the written entry, or to your notes, during the presentation.

At the beginning of the presentation (after introductions), the participants will present the proposal. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry itself (to which you may refer during the presentation).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



# INTEGRATED MARKETING CAMPAIGN EVENTS

INTEGRATED MARKETING CAMPAIGN—EVENT **IMCE**  
 INTEGRATED MARKETING CAMPAIGN—PRODUCT **IMCP**  
 INTEGRATED MARKETING CAMPAIGN—SERVICE **IMCS**

## EVALUATION FORM

	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Executive Summary: One-page description provides a clear overview of the campaign	0-1-2-3	4-5-6	7-8	9-10	
2. The description of the event, product or service, and business is clearly defined	0-1	2-3	4-5	6	
3. Objectives are defined and referenced throughout the campaign	0-1-2	3-4-5	6	7-8	
4. The target market is clearly analyzed	0-1	2-3	4-5	6	
5. The campaign activities are realistic, show evidence of marketing knowledge, and are research based	0-1-2-3	4-5-6-7	8-9-10	11-12	
6. Unifying theme is evident in all campaign activities	0-1	2-3	4-5	6	
7. Provides high-quality appropriate and creative samples of key marketing pieces suggested	0-1-2-3	4-5-6	7-8	9-10	
8. Campaign schedule is cohesive and plan is no more than 45 days long	0-1-2	3-4-5	6	7-8	
9. The budget is realistic for the campaign and all costs that would be incurred have been considered	0-1-2	3-4-5	6	7-8	
10. Key metrics are well thought out and appropriate for the campaign	0-1-2	3-4-5	6	7-8	
11. The campaign shows evidence of creativity and originality	0-1-2	3-4-5	6	7-8	
12. The written entry is well-organized, professional, and presented in a logical manner	0-1	2-3	4	5	
13. Overall performance: professional appearance, poise, confidence, presentation technique, effective use of visuals, professionalism of participants, participation by each participant	0-1	2-3	4	5	

**TOTAL POINTS (100)**

LESS PENALTY POINTS

**TOTAL SCORE**

JUDGE \_\_\_\_\_



# PROFESSIONAL SELLING AND CONSULTING EVENTS

FINANCIAL CONSULTING FCE  
HOSPITALITY AND TOURISM PROFESSIONAL SELLING HTPS  
PROFESSIONAL SELLING PSE

The **Professional Selling and Consulting Events** provide an opportunity for participants to demonstrate skills needed for a career in sales and/or consulting. Participants will organize and deliver a sales presentation or consultation for one or more products/services/customers.

The guidelines for each of the Professional Selling and Consulting Events have been consolidated to facilitate coordination of participant activities in each of the career categories. This means the evaluation form will be the same for each career category. However, each career category will deliver a sales presentation or consultation for a different product or customer described below in the “Products/Services and Target Customer Descriptions” section.

## 2023-2024 SCENARIOS

New products, services and target market customers (prospects) will be identified annually. The participant will research an actual company that he/she represents and real product(s)/services(s) to be presented. The participant will also research the target customer that the product/service will be presented to. Then the participant will present the product(s)/service(s) using the steps in the selling/consulting process to meet the needs of the customer (prospect).

### \$ FINANCE

**Financial Consulting:** For 2023-2024, you will assume the role of a financial consultant. A small-business client has scheduled a meeting with you because they would like to add a peer-to-peer payment platform option for their customers. The client would like you to share and explain different peer-to-peer platforms and make a recommendation that will have a positive financial impact.

### 🌐 HOSPITALITY + TOURISM

**Hospitality and Tourism Professional Selling:** For 2023-2024, you will assume the role of a sales manager for a glamping resort. You are meeting with the CEO of a company that is hosting a retreat for its 12 employees and their immediate families. During the meeting, you should discuss, at a minimum, the setting, accommodations, dining and activities. This meeting is very important to the CEO, who is also wanting to host an annual kick-off meeting during the retreat in a creative meeting space for only the 12 employees.

### 📱 MARKETING

**Professional Selling:** For 2023-2024, you will assume the role of a sales representative for a company that specializes in assisting clients with social media selling strategies. Social selling is a sales method that practices incorporating social networks into every stage of the sales process. A large part of the customer experience now takes place on social media and in more casual communication channels. You have a meeting scheduled with the owner of a local retail boutique to present the services your company can provide for expanding their company’s social media selling strategies.

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today’s employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA’s competitive events.

## EVENT OVERVIEW

- These events consist of two major parts: the cluster exam and the oral presentation. The maximum score for the presentation evaluation is 100 points. The presentation will be weighted at twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.
- These events are for **individual participants** only.
- The participant will be given a 100-question, multiple-choice, **cluster exam** testing knowledge of the Business Administration Core performance indicators and the Cluster Core performance indicators.
  - Participants in the Financial Consulting Event will take the Finance Cluster Exam.
  - Participants in the Hospitality and Tourism Professional Selling Event will take the Hospitality and Tourism Cluster Exam.
  - Participants in the Professional Selling Event will take the Marketing Cluster Exam.Complete lists of performance indicators are available at [www.deca.org](http://www.deca.org).
- The participant will organize appropriate information and present a sales presentation or provide consultation to a potential buyer or client.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation, focusing on the effectiveness of public speaking and presentation skills and how well the participant responds to questions that the judge may ask during the presentation.

## PRESENTATION GUIDELINES

- The objective for the sales presentation or consultation is for the participant to assume the role of salesperson or consultant making a presentation to a potential buyer or client (judge). Prior to ICDC, the participant will prepare a sales presentation or consultation presentation for the product/service and target market customers described in the appropriate categories.
- The participant will make a 15-minute sales presentation or consultation presentation to the judge worth 100 points. (See Presentation Judging.)
- The presentation begins immediately after the introduction of the participant to the judge by the adult assistant.
- The participant may bring presentation notes to use during the sales presentation or consultation.
- If time remains, the judge may ask questions pertaining to the sales presentation or consultation.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## PRESENTATION JUDGING

The participant will make a 15-minute presentation or consultation to you. As the judge, you are to assume the role of a potential buyer for the product(s) and/or service(s) or a client seeking consultation.

At the beginning of the presentation (after introductions), the participant will make the presentation or consultation. Allow the participant to complete this portion without interruption, unless you are asked to respond.

If time remains, you may ask questions that seem appropriate.

At the conclusion of the presentation, thank the participant. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



1 PARTICIPANT



CLUSTER  
SPECIFIC EXAM



CONSULTATION /  
SALES PRESENTATION



15 MINUTES  
INTERVIEW TIME



# PROFESSIONAL SELLING AND CONSULTING EVENTS

FINANCIAL CONSULTING FCE

HOSPITALITY AND TOURISM PROFESSIONAL SELLING HTPS

PROFESSIONAL SELLING PSE

## EVALUATION FORM

	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Presented an effective and engaging opening	0-1	2-3	4-5	6-7	
2. Established relationship with customer/client	0-1	2-3-4	5-6	7-8	
3. Communicated understanding of customer/client needs	0-1	2-3-4	5-6	7-8	
4. Facilitated customer/client buying decisions	0-1	2-3-4	5-6	7-8	
5. Recommended specific product(s)/service(s)/action(s)	0-1	2-3-4	5-6	7-8	
6. Demonstrated or explained product(s)/service(s)/action(s)	0-1	2-3-4	5-6	7-8	
7. Properly stated features and benefits of product(s)/service(s)/action(s)	0-1	2-3	4-5	6-7	
8. Prescribed a solution(s) to meet customer/client needs	0-1	2-3-4	5-6	7-8	
9. Effectively answered customer/client questions and concerns	0-1	2-3-4	5-6	7-8	
10. Effectively closed the sale or ended the consultation	0-1-2	3-4-5	6-7-8	9-10	
11. The presentation was well-organized and clearly presented; used professional grammar and vocabulary, words were enunciated and pronounced clearly, voice conveyed enthusiasm and volume was appropriate for the situation.	0-1-2	3-4-5	6-7-8	9-10	
12. Professional appearance, poise and confidence	0-1	2-3	4	5	
13. Overall impression	0-1	2-3	4	5	

**TOTAL POINTS (100)**

**TOTAL SCORE**

JUDGE \_\_\_\_\_



# STOCK MARKET GAME

## STOCK MARKET GAME SMG

Participants in the SIFMA Foundation **Stock Market Game** develop and manage an online investment portfolio of stocks, mutual funds, bonds, ESG investments and cash. The Stock Market Game is available via web browser on any device or on The Stock Market Game mobile app available on Android or Apple. SMG allows DECA members to test their investment knowledge and skills against other DECA members in an online competition. The goal of the competition is to provide participants with the skills needed to be successful in their future financial lives by managing a diversified investment portfolio.

## \$ FINANCE

### ONLINE EVENT OVERVIEW

It is the responsibility of the advisor and every member of participating teams to familiarize themselves with the Program Rules and Code of Participation for The Stock Market Game at [deca.org/smg/rules](https://deca.org/smg/rules) and the DECA Stock Market Game rules below. Both sets of rules are also accessible in the team portfolio by clicking Resources, Rules of the Game and Local Rules. Failure to comply with Program Rules or Code of Participation and/or the DECA Stock Market Game rules will result in disqualification from the DECA Stock Market Game.

In addition, it is the responsibility of the advisor and every member of participating teams to review the SIFMA Foundation's Code of Conduct available at the bottom of each website and team portfolio page and at [deca.org/smg/conduct](https://deca.org/smg/conduct). DECA advisors and/or members attending SIFMA Foundation events, virtual or in-person, who do not follow the guidelines set forth in the Code of Conduct will be disqualified from the DECA Stock Market Game. Final determination of disqualification from the DECA Stock Market Game rests solely with the SIFMA Foundation.

The DECA Stock Market Game will contain one ICDC qualifying event to take place from Monday, September 11, 2023, through Friday, December 8, 2023.

### COMPETITION GUIDELINES

- **Registration:** DECA advisors must register their student members at [deca.org/smg](https://deca.org/smg) to participate in the competition. All advisors and students participating in the DECA Stock Market Game must be DECA members. Membership is verified with DECA weekly and subsequently updated in the DECA Stock Market Game registration system. Registrations not submitted for the DECA Stock Market Game by DECA advisors will be deleted.
- **Team Members & Student Name Deadline:** Teams must be comprised of one to three students. It is the responsibility of advisors to ensure the accuracy of student names for each team. Advisors can review student names in the Teacher Support Center by clicking "View Team Portfolios" and clicking into each class in the "Class Name" column. Advisors can edit student names up until the Student Name Submission Deadline by clicking "Update Student Names". Advisors can email [decasmg@sifma.org](mailto:decasmg@sifma.org) to add teams to their existing account. Please allow two business days for your request to be processed in the system. Final team additions must be submitted to [decasmg@sifma.org](mailto:decasmg@sifma.org) by Friday, October 20, 2023 at 4 p.m. ET.
- **Communication:** All questions must be submitted by the DECA advisor to [decasmg@sifma.org](mailto:decasmg@sifma.org). Only advisor emails will receive a response from the DECA Stock Market Game.
- **Account Type-Margin:** Each team begins with \$100,000 in cash and may borrow an additional 50% of their Total Equity in margin up to an aggregate limit, if any, as set forth in The Stock Market Game Program Rules.
- **Market Hours & Trade Type (End of Day):** The DECA Stock Market Game runs Monday to Friday with hours of operation from 9:30 a.m. to 4 p.m. ET. Teams may trade on any day the participating stock markets are open. Trades placed during market hours are priced at that business day's closing price. Trades entered after market hours or during market holidays are priced at the next business day's closing price. Trades may be canceled in Pending Orders up to market close (4 p.m. ET) that business day.

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

- **Trading Options:** Stock buys/sells and short sells/covers are allowed, as well as mutual fund and bond buy/sell orders. Trading in futures, options, commodities, currencies and bitcoin is not permitted.
- **Maximum Equity:** Teams may not invest more than 20% of their Total Equity multiplied by 1.5 in any one security. If a security in a team's portfolio increases in value and places the investment beyond 20% of their total equity multiplied by 1.5, they will be able to retain their shares but unable to purchase additional shares of that security.
- **Asset Diversification:** Each team must make investments of at least \$10,000 per asset class (stocks, mutual funds and bonds) by Friday, October 27, 2023 at 4 p.m. ET and hold the investment until the end of the competition (Friday, December 8, 2023, at 4 p.m. ET). If teams sell some or all of an asset class position after the Asset Diversification Deadline, they must make an investment in the same asset class totaling a holding of \$10,000 within one business day to remain diversified. If the value of an investment decreases below the \$10,000 minimum, teams do not need to invest more. Teams can confirm they are diversified by adding the Net Cost of their investments per asset class (minus the \$5 transaction fee) on the Account Holdings page. Team portfolios will be subject to periodic random review to confirm the \$10,000 investment per asset has been maintained. Please note that all ETFs (including bond ETFs) are classified as stocks, all bond mutual funds are classified as mutual funds, and only long stock positions count towards the stock diversification requirement.
- **Team Portfolios:** Each team must complete their own research and portfolios must be distinct and reflect the individual team's investment strategy. Portfolios are subject to review, and any violation may result in disqualification from the DECA Stock Market Game. Final determination of disqualification from the DECA Stock Market Game rests solely with the SIFMA Foundation.
- **Rankings:** A record of a team's portfolio and transactions will be available daily, subject to overnight portfolio processing. A team will not receive a portfolio ranking nor be listed in regional rankings until its initial transaction is entered successfully. Rankings will be determined based on a portfolio's Percent Return as compared to S&P 500 Growth for the time period of the competition. Please note that final rankings are determined net of any borrowed funds regardless of whether portfolios are liquidated at the end of the competition.
- **ICDC Qualifiers:** The top 25 teams from each DECA region, that abide by all DECA Stock Market Game program rules, guidelines, Code of Participation and Code of Conduct, will be submitted to DECA for ICDC qualification. Only students submitted before the Student Name Submission Deadline (Friday, October 20, 2023 at 4 p.m. ET) are eligible to rank in the top 25 teams. No substitutions or additions to teams will be allowed after the Student Name Submission Deadline has passed. Members competing at ICDC in The Stock Market Game may not compete in another ICDC event/activity. Only original team members may compete at ICDC.
- **Portfolio Deletion:** Portfolios will be available for retrieval until Monday, May 20, 2024. Please make sure to save all relevant portfolio data before then.

## IMPORTANT DATES

- **Competition Begins:** Monday, September 11, 2023, 9:30 a.m. ET
- **Student Name Submission:** Friday, October 20, 2023, 4 p.m. ET
- **Asset Diversification:** Friday, October 27, 2023, 4 p.m. ET — Friday, December 8, 2023, 4 p.m. ET
- **Competition Ends:** Friday, December 8, 2023, 4 p.m. ET
- **Portfolio Deletion:** Monday, May 20, 2024



1-3 PARTICIPANTS



ONLINE  
SIMULATION



10 PAGES  
ALLOWED



PRESENT PORTFOLIO



15 MINUTES  
INTERVIEW TIME

## ICDC QUALIFIER EVENT OVERVIEW

In addition to the general rules of the Stock Market Game, DECA advisors and their teams should be aware of the following:

- This event consists of a **written document** describing the investment project and the **oral presentation**.
- Each event entry will be composed of **one to three members** of the DECA chapter. A team member cannot be on more than one team at a time. No additional team members may be added once a team has registered.
- The body of the written entry must be limited to **10 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.
- The **Written Event Statement of Assurances and Academic Integrity** must be signed and submitted with the entry. Do not include it in the page numbering.
- The oral presentation may be a maximum of **15 minutes** in length, including time for judge's questions.
- The judge will evaluate the presentation of and defense for the investment project, focusing on the effectiveness of public speaking and presentation skills.
- Eligibility to attend the international conference is determined by the chartered associations, based on their policies. Finalists should consult with their chartered association advisor for eligibility guidelines.
- For complete Stock Market Game event guidelines, procedures and ICDC information, go to [deca.org/smg](https://deca.org/smg).



## WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Penalty Point Checklist and the Written Entry Evaluation Form.

**WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY.** This must be signed and submitted with the entry. Do **not** include it in the page numbering.

**TITLE PAGE.** The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

- STOCK MARKET GAME
- Name of high school
- School address
- City, State/Province, ZIP/Postal Code
- Names of participants
- Date

Title page will **not** be numbered.

**TABLE OF CONTENTS.** The table of contents should follow the title page. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will **not** be numbered.

**BODY OF THE WRITTEN ENTRY.** The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered “1” and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

The participants will prepare a written document, which is limited to 10 pages (not including the title page).

This outline must be followed. Points for each section are shown on the Presentation Evaluation Form. Each section must be titled, including the bibliography and the appendix.

### I. EXECUTIVE SUMMARY

One-page description of the project

### II. ANALYSIS OF PORTFOLIO PERFORMANCE

### III. RATIONALE

- A. Explanation of research conducted prior to selection of stocks and/or funds
- B. Strategy used to diversify investment portfolio
- C. Description of how selected stocks and/or funds fit strategy

### IV. CONCLUSIONS AND FINDINGS

- A. Explanation of strategy effectiveness
- B. Proposed changes in strategy for future investments

### V. CHARTS/DIAGRAMS OF PORTFOLIO PERFORMANCE

### VI. BIBLIOGRAPHY

A bibliography is required. Include a list of the sources of information used in the written document.

### VII. APPENDIX

An appendix is optional. Include in an appendix any exhibits appropriate to the written entry but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

## **PENALTY POINT CHECKLIST**

In addition to the Written Entry Guidelines, participants must observe all of the standards on the Penalty Point Checklist on page 54. These standards are designed to make competition as fair as possible.

## **PRESENTATION GUIDELINES**

- The participants will present to the judge in a 15-minute presentation worth 100 points (See Presentation Judging).
- The presentation begins immediately after the introduction of the participants to the judge by the adult assistant.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the project.
- Only visual aids that can be easily hand carried to the presentation by the actual participant(s) will be permitted. The participants themselves must set up the visuals. Wheeled carts, moving straps or similar items may not be used to bring visuals into the area. Set up time is included in the total presentation time. Participants must furnish their own materials and equipment. No electrical power or internet connection will be supplied. Alternate power sources such as small generators are not allowed. Sound may be used, as long as the volume is kept at a conversational level.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- If any of these rules are violated, the adult assistant must be notified by the judge.

## **PRESENTATION JUDGING**

Participants will make a 15-minute presentation to you. As the judge, you are to assume the role of a manager. You may refer to the written entry, or to your notes, during the presentation.

At the beginning of the presentation (after introductions), the participants will present the investment project. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry itself (to which you may refer during the presentation).

At the conclusion of the presentation, thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points.



# STOCK MARKET GAME

STOCK MARKET GAME SMG

## EVALUATION FORM

	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Executive Summary: One-page description of the project.	0-1-2-3	4-5-6	7-8	9-10	
2. The written entry and oral presentation show evidence of a realistic knowledge of investment trends and financial markets.	0-1	2-3	4	5-6	
3. The stock portfolio exhibits diversity across sectors of the economy.	0-1	2-3	4	5-6	
4. The written entry and oral presentation demonstrate an understanding of investment objectives.	0-1-2-3-4	5-6-7-8-9	10-11-12	13-14	
5. The written entry and oral presentation demonstrate correct use of investment terminology.	0-1	2-3	4	5-6	
6. The written entry and oral presentation demonstrate research beyond the stock's performance history—i.e., the investment decisions were based on knowledge of the company's underlying business performance or plans.	0-1-2-3-4	5-6-7-8-9	10-11-12	13-14	
7. The written entry and oral presentation explain the effectiveness of the strategy.	0-1-2-3-4	5-6-7-8-9	10-11-12	13	
8. The written entry and oral presentation explain changes in strategy for future investments.	0-1-2-3-4	5-6-7-8-9	10-11-12	13	
9. The written entry is well-organized, professional, and presented in a logical manner.	0-1	2-3	4	5-6	
10. The oral presentation proceeds in a logical, organized manner and is appropriate to the investment industry.	0-1	2-3	4	5-6	
11. Overall performance: professional appearance, poise, confidence, presentation technique, effective use of visuals, professionalism of participants, participation by each participant	0-1	2-3	4	5-6	

<b>TOTAL POINTS (100)</b>	
LESS PENALTY POINTS	
<b>TOTAL SCORE</b>	

JUDGE \_\_\_\_\_



# VIRTUAL BUSINESS CHALLENGE

**ACCOUNTING VBCAC**  
*Sponsored by Knowledge Matters*

**ENTREPRENEURSHIP VBCEN**  
*Sponsored by Knowledge Matters*

**FASHION VBCFA**  
*Sponsored by Knowledge Matters*

**HOTEL MANAGEMENT VBCHM**

**PERSONAL FINANCE VBCPF**  
*Sponsored by Knowledge Matters*

**RESTAURANT VBCRS**  
*Sponsored by Knowledge Matters*

**RETAIL VBCRT**  
*Sponsored by Knowledge Matters*

**SPORTS VBCSP**  
*Sponsored by Knowledge Matters*

Participants in the **DECA Virtual Business Challenge (VBC)** operate a web-based business simulation utilizing a competition version of the Virtual Business software. The VBC qualifying rounds are conducted via the internet, where participants will vie for chartered association, regional and overall rankings.

## CAREER CLUSTERS + DEFINITIONS

The following definitions are used to determine the activities that are included in each of the Virtual Business Challenges.

### ENTREPRENEURSHIP

**Entrepreneurship:** Participants will:

- conduct market research, spot new business opportunities and take the plunge by embarking on their very own entrepreneurial venture with 20 different businesses to choose from
- implement new business strategies via requesting financing, building their team, acquiring resources, setting prices, developing their marketing and more
- analyze market data, interpret financial reports and apply critical thinking and decision making skills in order to make their entrepreneurial venture as successful as possible

### FINANCE

**Accounting:** Participants will:

- use forensic accounting to identify fraud and errors and use managerial accounting techniques to maximize profits
- analyze accounting documents, such as T-accounts, worksheets, journals and the general ledger, as well as source documents such as time sheets, customer invoices, pay records and more in order to identify issues

### HOSPITALITY + TOURISM

**Hotel Management:** Participants will:

- manage different aspects of a hotel, such as revenue management, group sales, marketing, front desk operations, banquets/meetings, housekeeping and more
- interpret industry specific reports, such as the Group Sales PACE Report, the STAR Competitive Report, the Market Data Report, the Daily Revenue Report and more, in order to assist with making informed decisions and implementing strategies that will optimize profitability

**Restaurant:** Participants will:

- manage specific marketing and business concepts, such as market research, menu design and pricing, advertising strategies and purchasing within their own restaurant
- interpret actions, financial information, and reports, such as the Product/Menu Mix and Menu Matrix Analysis reports, in order to make strategic marketing decisions for their restaurant

## KNOWLEDGE AND SKILLS DEVELOPED

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

Participants will also develop many 21<sup>st</sup> Century Skills, in the following categories, desired by today's employers:

- Communication and Collaboration
- Creativity and Innovation
- Critical Thinking and Problem Solving
- Flexibility and Adaptability
- Information Literacy
- Initiative and Self-direction
- Leadership and Responsibility
- Media Literacy
- Productivity and Accountability
- Social and Cross-cultural Skills

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

**Fashion:** Participants will:

- scour runway and street blogs for emerging and viral fashion trends
- manage marketing, business and fashion-specific concepts such as design, buying, pricing and markdowns, social media promotion, window display and merchandising within their own fashion design business
- interpret actions, charts and reports, such as the Income Statement and the “Instatrend” report in order to make strategic marketing decisions for their fashion business to optimize profitability

**Retailing:** Participants will:

- manage specific marketing concepts, such as pricing, purchasing and promotion within their own supermarket, sporting goods or electronics stores
- interpret actions, charts and reports, such as the Inventory and Sales & Margin reports, in order to make strategic marketing decisions for their store to optimize profitability

**Sports:** Participants will:

- manage specific marketing concepts, such as ticket pricing, social media, concessions and sponsorships within their own football franchise
- interpret actions, charts and reports, such as the event reports, financial reports and social media results, in order to make strategic marketing decisions for their franchise to optimize profitability

# PERSONAL FINANCIAL LITERACY

**Personal Finance:** Participants will:

- manage bank accounts, credit and debit cards, bills, credit scores, taxes, insurance, online banking and more
- interpret actions, charts and reports, such as credit reports, bank statements and pay and tax records, in order to make strategic financial decisions and optimize net worth

## ONLINE EVENT OVERVIEW

- The Virtual Business Challenge will contain two (2) International Career Development Conference qualifying rounds. Challenge 1: Tuesday, October 17, 2023, 10:00 a.m. EDT through Friday, October 27, 2023, 5:00 p.m. EDT. Challenge 2: Tuesday, January 16, 2024, 10:00 a.m. EST through Friday, January 26, 2024, 5:00 p.m. EST.
- Entries will be composed of **one to three members** of the DECA chapter. A team member may be on an accounting, an entrepreneurship, a fashion, a hotel, a personal finance, a restaurant, a retail and a sports team at the same time; however, a team member may not be on multiple accounting, multiple entrepreneurship, multiple fashion, multiple hotel, multiple personal finance, multiple restaurant, multiple sports or multiple retail teams at the same time. No additional team members may be added once a team has registered.
- For all tracks, the top two teams from each region from each of the qualifying rounds will be eligible to compete at ICDC. However, eligibility to attend ICDC is determined by the chartered associations, based on their policies. Finalists should consult with their chartered association advisor for eligibility guidelines. Only one team per chapter, per round, per track may qualify to compete at ICDC. Only original team members may compete at ICDC; no substitutions may be made.
- A member may compete in the accounting VBC, the entrepreneurship VBC, the fashion VBC, the hotel VBC, the personal finance VBC, the restaurant VBC, the retail VBC, and the sports VBC; however, the member will be allowed to participate in only one VBC track at ICDC.
- Top teams in each chartered association may receive recognition by their chartered association.

## ICDC QUALIFIER EVENT OVERVIEW

- At ICDC, all VBC tracks will compete in two sessions, and final rankings will be determined based on their cumulative total profit (or net worth for the Personal Finance sim) from both sessions.
- The competition sessions at ICDC will run for approximately 15 minutes. Each team will control starting and stopping their simulation file as well as the speed at which they would like to run the file. Teams will be competing in single-player mode. Participants should expect to control most, if not all, of the features listed under the Actions menu within the simulation. During the competition sessions, participants must run their simulation through the required amount of simulated time in order to be eligible to advance to the next round.
- Participants are allowed to bring notes to use during the competition sessions at ICDC.
- Members qualifying for participation at ICDC must wear a DECA blazer during the competition sessions.
- Members competing at ICDC in Virtual Business Challenge may not compete in another ICDC event/activity.
- For complete Virtual Business Challenge event guidelines and procedures, go to [vbc.knowledgematters.com/vbc](http://vbc.knowledgematters.com/vbc).



1-3 PARTICIPANTS



ONLINE SIMULATION