

## 2015 Marketing Plan Performance-Based Assessments Rules and Guidelines

Information on the PBA

Website: [www.highschoolplans.org](http://www.highschoolplans.org)

Email: [pace@hawaii.edu](mailto:pace@hawaii.edu)

### ABOUT

The High School Marketing Plan Performance-Based Assessment (PBA) is a joint program developed by the State of Hawai'i Department of Education and the University of Hawai'i at Mānoa Shidler College of Business Department of Marketing. The program is administered by the Pacific Asian Center for Entrepreneurship (PACE) at the Shidler College of Business. It is designed to:

- Provide Hawai'i's secondary students with hands-on, professional marketing experience through which classroom concepts and theories developed as part of the Business Career Pathway Marketing Cluster can be applied and tested.
- Enhance general understanding of the importance of marketing and business to the State's economy.
- Promote marketing education in Hawai'i by supporting a high quality curriculum throughout Hawai'i's secondary schools.
- Connect professional marketers who will serve as resources for high school teachers of marketing.

### RULES

- Eligibility: Students who have completed the business core course and are currently enrolled in or have completed the Marketing course.
- Career and Technical Education (CTE) teachers may enter any number of teams. Priority participation will be given to students completing the Marketing program of study.
- Team members must be enrolled in the CTE teacher's CTE course. A CTE course is one that has a "V" designation in the 2006 ACCN or a "T," excluding "TC," designation from the latest laser version of the ACCN.
- Each team must have two to three members.
- All team members must be present during the PBA. Disqualification will result if all members are not present by the start of the PBA.
- All students must attend the final presentations. Attendance will be taken.
- Each team must bring their own equipment and computers pre-loaded with the appropriate software. The organizers will not be responsible for compatibility and other technical issues.
- All team members must be dressed in appropriate professional attire. See professional attire guidelines.

### EVENT OVERVIEW

In the Marketing Plan Performance-Based Assessments, students will serve as a team of marketing consultants to an existing business. Students will be responsible for recruiting a client, collecting relevant information from the business and maintaining clear and open communication with company representatives. The team members will develop a formal marketing plan that includes market research and analysis, a marketing strategy proposal, a budget and an evaluation plan. The team will then implement a short-term strategy of their plan and develop appropriate promotional material to sell the company's products or services.

After the implementation period, the students will gather data and submit an analysis of the plan's effectiveness. At the PBA event, the students will work with mentors to further analyze the plan's effectiveness and deliver an oral presentation to a panel of judges.

In addition, students will take two 50-question exams, assessing proficiency of the Business Core and Marketing standards.

## **PERFORMANCE-BASED ASSESSMENT PROCEDURE**

### **Project Proposal and Intent to Participate**

**Due: Noon on Jan. 16, 2015**

To participate, teams must complete an online project proposal form at [www.highschoolplans.org/project-proposal](http://www.highschoolplans.org/project-proposal). The form requests for school information, team information and client information including a short description of the client and their marketing problem. The form will be regarded as an intent to participate.

PACE will review the project proposal to assure feasibility of the project within the time available; that the research has a large enough scope; and that the research is framed correctly. PACE will notify teachers by email of approval/denial by January 23, 2015.

### **Signed Project Agreement**

**Due: Noon on Jan. 16, 2015**

Students, parents/guardian, teachers and clients must sign the project agreement and submit it to PACE via email [pace@hawaii.edu](mailto:pace@hawaii.edu) or fax at (808) 956-5107. The form can be downloaded from [www.highschoolplans.org](http://www.highschoolplans.org)

### **Marketing Plan Funding Application**

**Due: Noon on Feb. 9, 2015**

CTE will provide \$50 to each team to implement a short-term strategy of their plan. To request funds, complete the online form at [www.highschoolplans.org/funding-application](http://www.highschoolplans.org/funding-application). Each team will need to designate one person to whom the check will be made to.

### **Registration**

**Due: Feb. 24, 2015**

See your school's CTE coordinator for more information. This is the last day to drop without penalty.

### **Implementation Period**

**Mar. 2-27, 2015**

Students will implement a short-term strategy of the marketing plan to promote and sell their client's products or services. All marketing strategies and materials must be pre-approved by the client before they can be used in public.

### **Online Examination**

**Mar. 2-27, 2015**

Students must take the Business Core and Marketing examinations to measure their proficiency of the pathway standards. Students should be familiar with the concepts on the list of terms as they may appear on the Marketing exam. The exam will be available online and registration instructions will be announced by the CTE office.

## **Marketing Plan**

**Due: Noon on March 6, 2015**

Submit the final written plan as ONE PDF FILE at [www.highschoolplans.org/submit-mplan](http://www.highschoolplans.org/submit-mplan). PACE will not accept any other file formats (Word, Excel, etc.). The file size limit is 10MB. The written plan must follow the Written Report Guidelines and Formatting Standards.

The team must also submit a copy of the marketing plan to their client for the company's feedback and authorization to implement the plan.

## **Prop Approval Form**

**Due: Noon on March 31, 2015**

Teams may use props and provide judges with other items to deliver their presentation. However, these props must be reported on the Prop Approval Form. Complete the form at [www.highschoolplans.org/prop-form](http://www.highschoolplans.org/prop-form).

## **Implementation Analysis**

**Due: Noon on April 1, 2015**

Based on the data collected from the implementation period, teams must submit a 1-2 page analysis that includes:

- A description of the methods used to gather and report market research findings and how the effectiveness of the marketing plan was determined.
- An evaluation of the methods used to implement the plan and explanation of which methods were most effective (based on the evaluation plan) and why or why not.

Teams may include up to five additional pages of graphs and charts to illustrate cost effectiveness and budget.

Submit the analysis as ONE PDF FILE at [www.highschoolplans.org/submit-analysis](http://www.highschoolplans.org/submit-analysis). PACE will not accept any other file formats (Word, Excel, etc.). The file size limit is 10MB.

## **Marketing Plan Expense Report**

**Due: Noon on April 1, 2015**

Teams must complete the expense report at [www.highschoolplans.org/expense-report](http://www.highschoolplans.org/expense-report). Teams will be required to itemize their expenses and upload scans of receipts as documentation.

## **Advance Teacher Packets**

**March 31, 2015**

PACE will email an Advance Teacher Packet to teachers a week before the PBA event. The packet will include general information, agendas, a hotel map, checklists for teachers and students, and sample summary evaluation sheets. Teachers should read through all of the documents and email [pace@hawaii.edu](mailto:pace@hawaii.edu) with questions.

## **Performance-Based Assessment**

**April 7-8, 2015**

- Professional business practitioners and educators will review all written plans prior to the event.
- On the morning of the first day, students will meet with coaches to further analyze the effectiveness of the students' marketing plan and practice their oral presentation.

- In the afternoon of the first day, teams will present their plan and implementation analysis using slide decks and visual aids to a panel of judges. The presentation will be followed by a question and answer session with the judges. See the Oral Presentation Guidelines for rules and procedures.
- At the end of the first day, finalists will be announced, in no particular order. The finalists will be determined by combining the average scores from the written plan, the oral presentation and the average of the core and cluster online examination. The order of the final presentation will be decided by random drawing.
- On the second day, the finalists will give their oral presentation to a panel of final round judges, who will determine the winners of the event. All students must be present for the final presentations. Attendance will be taken.
- See score sheets for judging criteria. Point deductions will be made for non-adherence to guidelines and criteria.

### **Awards**

- Students who meet the proficiency threshold of 70 percent in each category will be recognized.
- Teams whose scores qualify them for first, second and third overall will receive industry-sponsored awards.