

Teacher Pacing Guide 2013-2014

Time-frame	Task / Component Task	VE Curric. Task #	Suggested Resources
Month 1	What is VE?	ORIENT 1	REF: Expectations and Requirements for the VE Memo
	Intro the VE website	ORIENT 1	Webinar - Reference Files
	Intro to VE resources	ORIENT 13	REF: Learning Express Library
	Intro to VE activities timeline	ORIENT 7	REF: Annual Activities Map for VE Firms
	How to be successful in VE (time mgmt, brainstorming, mtg procedures)	ORIENT 3, 12 / ADMIN 7	REF: Calendar Template, REF: Daily Progress Log
	Administer the VE Pre-test		www.learningexpressadvantage.com
	Brainstorm business ideas and potential business models	ORIENT 12	VIDEO: The Business Model Canvas (youtube)
	Prepare a Resume & Cover Letter	ORIENT 2, 4, 5	REF: Resume Sample 1 & 2, REF: Resume Rubric
	Business resources & research	ORIENT 13	
	Writing business letters	ORIENT 8, 11	
	Conduct interviews & place employees	HR 15	Interview Notes Template
	Establish meeting procedures	ADMIN 7	REF: Meeting Minutes Sample
	Manage firm correspondence	ADMIN 6 / ORIENT 9, 10, 11	
	Create a firm directory & organization chart	ADMIN 4 / HR 2, 3	REF: Sample Employee Manual (Sample Org Chart, p 7)
	Create job descriptions	ORIENT 6	Sample job descriptions
	Set up/manage the firm email account (@veinternational.org)	IT (TBD)	REF: Email User Guide
	Set up employee bank accounts	ACCT 11, PERS FIN 1	Resources Page: US Network Bank- Bank User Guide
	Register the business	ADMIN (TBD)	SUBMIT: Business Registration Form
	Establish an office equipment inventory	ADMIN 1 / IT (TBD)	REF: Asset Log*
	Establish an office equipment usage policy	ADMIN 2 / IT (TBD)	REF: Sample Employee Manual
Create a system for storing and sharing files	ADMIN 3 / IT (TBD)		
Write the firm's Mission Statement	ADMIN 8	Real world company websites, REF: Gotham Hardware Business Plan	
Set the goals and objectives for the firm	ADMIN 9	SMART Goals	
Determine the legal structure of the business	ADMIN (TBD)	SUBMIT: Application for Incorporation	

Time-frame	Task	VE Curric. Task #	Suggested Resources
Month 2	Prepare a company cash budget	ACCT 2	REF: Cash Budget*
	Sales projections	ACCT 2A	REF: Sales Forecast Template
	Cost of Merchandise	ACCT 2A	
	Rent	ACCT 2	Local rate apply, must be researched based on location of the company
	Utilities	ACCT 2	Local rate apply, must be researched based on location of the company
	Insurance	ADMIN 15	REF: INVEST Insurance Rating Tool
	Salaries	ACCT 5	www.salary.com
	Advertising & Promotion	SLS-MKT 11	
	Loan Repayment & Interest	ACCT 7	REF: Loan Amortization Table, REF: Loan Payment Table
	Establish Business Contracts to support sales	<i>SLS-MKT (TBD)</i>	REF: Legal considerations for contracts and invoices, REF: Sample Business Contract
	Set up the firm's Accounting System	Accounting Guide	REF: Accounting Department Workflow
	Establish procedures for managing the firm bank account	ACCT 10	US Network Bank: Bank User Guide
	review online excel templates	ACCT 3	REF: Accounting
	review accounting guide	ACCT 10	
	Cash Receipts & Payments Journal		REF: Cash Receipts & Cash Payments Journal*
	Purchases Journal (Acct Pay)	ACCT 12 / PURCH 2, 3, 4	REF: Purchases Journal & Accts Payable Record*
	Sales Journal (A/R rec)	ACCT 8	REF: Sales Journal & Accts Receivable Record*
	set up Wholesale marketplace	ACCT 15, PURCH 2, 3, 4	Wholesale Marketplace User Guide, REF: Inventory Record*
	inventory log	ACCT 15	REF: Inventory Record*
	Establish HR procedures		
	Create a welcome presentation for new employees	HR 4	
	Establish attendance procedures	HR 1	REF: Sample Timesheet
	Implement a Daily Progress Log		REF: Daily Progress Log
	Create or update the employee manual	HR 5 / GRAPHICS 4	REF: Sample Employee Manual
	Establish a grading policy	ORIENT 1	REF: Expectations and Requirements for the VE Memo, REF: Grading Policy Example
	Implement an employee appreciation policy	HR 10 / GRAPHICS 5	
	Develop a "Bad News Message" (reprimand, dismissal, demotion, etc)	HR 9	REF: Sample Employee Manual
	Prepare a company presentation on ethics	HR 13	
	Establish a conflict resolution policy	HR 14	REF: Sample Employee Manual
	Create an employee performance evaluation	HR 8	REF: Evaluation Templates

	Task	VE Curric. Task #	Suggested Resources
	Set up payroll procedures	ACCT 5	REF: Payroll Register with Explanations*, REF: W-2,W-3,W-4 Forms
	Develop a personal budget	PERS FIN 3	REF: Personal Budget Template
	Employee purchases and trading	ADMIN 12, 13	
	Establish design guidelines for the company	GRAPHICS 1	
	Create a company logo	GRAPHICS 2	
	templates (letterhead, fax cover, business cards)	GRAPHICS 3 / ADMIN 5	REF: Fax Form, REF: Letterhead Template, REF: Memo Form
	Brainstorm products and/or services	SLS-MKT 1	Resources Page: US Directory- Firm websites
	Evaluate the VE marketplace	SLS-MKT 2	REF: VE Market Report
	national & international directories		Resources Page: US Directory, Orange Pages
Month 3	Identify the firm's target market	SLS-MKT 3, 5	
	Develop pricing strategies for products/services	SLS-MKT 4	REF: Break-even Analysis
	Finalize product and/or service list	SLS-MKT 1 (cont)	
	Apply for a Business Loan	ACCT 7	REF: Loan Amortization Table, SUBMIT: Loan Application
	Develop a Business Plan	ADMIN 10 / GRAPHICS 6	REF: NBPC Rubrics, REF: Sample Business Plans - Gotham Hardware / Real World
	Economic environment	SLS-MKT (TBD)	
	The VE Market	SLS-MKT 2, 3, 5	REF: Firm Payroll Data, REF: Firm Financial Data, REF: VE Market Report
	Marketing Plan	SLS-MKT 4,6 7,11	REF: Social Media
	Break Even Analysis	ACCT 6	REF: Break-even Analysis
	Projected Financials	ACCT 3	REF: Asset Log*, REF: Cash Budget*, REF: Financial Statement Templates with Explanations
	SWOT & Risk Management	ADMIN (TBD)	
	Executive Summary	ADMIN (TBD)	
	Prepare a Business Plan presentation	ADMIN 11	
	Develop presentation template (design dept)	GRAPHICS 6	
	Organize information into slides	ADMIN (TBD)	
	Write effective bullet points	ADMIN (TBD)	
	Include charts and graphics to support points	ADMIN (TBD)	
	Prepare scripts for presenters	ADMIN (TBD)	
	Rehearse the presentation	ADMIN (TBD)	
	Begin website development	GRAPHICS 8	REF: Website Competition Rubric (Basic/Advanced) for NYC Trade Show
	template driven websites		

Time-frame	Task	VE Curric. Task #	Suggested Resources
Month 4	Complete an E-Commerce website	GRAPHICS 8	REF: Website Competition Rubric (Basic/Advanced) for NYC Trade Show
	develop a shopping cart utility	SLS-MKT (TBD)	
	Begin making sales	SLS-MKT 9	
	Prepare a sales presentation	SLS-MKT 10	
	Sales reporting & Invoicing procedures	SLS-MKT 12,13,14 / ACCT 8	REF: Legal considerations for contracts and invoices, REF: Sample Invoice - Gotham
	Sales Journal/A-R Record	ACCT 8	REF: Sales Journal & Accts Receivable Record*
	Use advertising	SLS-MKT 11	
Evaluate website traffic analytics	SLS-MKT (TBD) / IT (TBD)		
Month 5	Prepare W-2's for each employee	ACCT 16	REF: Payroll Register*, REF: Personal Tax Preparation, REF: W-2, W-3, W-4 Forms
	Prepare a W-3 for the firm	ACCT 16	REF: Payroll Register*, REF: W-2, W-3, W-4 Forms, SUBMIT: W3 Form
	Submit a 1040 for each employee	ACCT 19	REF: 1040 Form, REF: Instructions for 1040 Form, SUBMIT: 1040VE
	Conduct mid-year employee evaluations	HR 8	REF: Evaluation Templates
	Create a company newsletter (late Fall & Spring)	ADMIN 14 / HR 16	REF: Newsletter Template
	Prepare the Board of Directors Quarterly Report	ADMIN (TBD)	REF: Quarterly Report Guidelines / Template
	Engage in International Trade	SLS-MKT (TBD)	Procedures - PF Codes
Month 6, Month 7, Month 8	Implement the Business Plan and follow the Monthly Firm Activities		See Monthly Pacing Guide for Firms
	Prepare for a tradeshow	ADMIN 16	REF: Preparing for Trade Show PREZI, REF: Trade Show Preparation Guide
	conduct research on trade shows	ORIENT 13	
	brainstorm a theme	ORIENT 12	
	Develop a trade show budget	SLS-MKT 18	REF: Sample trade show budget
	develop a booth design	GRAPHICS 9	REF: Booth Rubric for the NYC Trade Show
	prepare promotional materials (catalog/brochures/banners/displays)	GRAPHICS 7 / SLS-MKT 14	REF: Catalog Rubric for the NYC Trade Show
	prepare sales materials (order forms/invoices)	GRAPHICS 7	REF: Sample Invoice - Gotham Hardware
	Create a sales pitch	SLS-MKT 9, 10	REF: Salesmanship Rubric for NYC Trade Show
	Train the sales staff	SLS-MKT 18	
	Adapt materials for foreign markets	SLS-MKT 17	REF: Currency Converter
	Manage Accounts Receivable	ACCT 8A	REF: Sales Journal & Accts Receivable Record*, REF: Cash Receipts & Cash Payments Journal*

Time-frame	Task	VE Curric. Task #	Suggested Resources
Month 9, Month 10	Prepare an Annual Report	ADMIN 17	REF: Annual Report Rubric, REF: Gotham Hardware Sample Annual Report, VIDEO: Preparing Your Annual Report
	What is your corporate message?	ADMIN (TBD)	
	Design a template	GRAPHICS 10	
	Letter to Shareholders	ADMIN (TBD)	
	Write management reports	SLS-MKT 19	
	Prepare financial statements	ACCT 20, 22	REF: Financial Statement Templates with Explanations
	Prepare financial highlights	ACCT 20, 22	
	Submit Firm Financial Data Form		REF: Firm Financial Data Form, SUBMIT: FFDF Income Statement, Balance Sheet, Cash Budget
	Submit the Annual Report		REF: Annual Report Submission Form
	Complete the corporate tax return	ACCT 21	REF: Corporate Tax Form, VIDEO: Preparing a Corporate Income Tax Return, SUBMIT: 1120VE
	Conduct end of the year employee evaluations	HR 8	REF: Evaluation Templates
	Recruit employees for next year's firm	HR 15, 17	
	Prepare for transition	ADMIN 18 / ACCT 23, 24	
	Administer the VE Post Test		www.learningexpressadvantage.com
	Administer the VE Economics Exam		www.learningexpressadvantage.com
Complete the Student Exit Questionnaire		REF: Student Exit Questionnaire	
Prepare employee portfolios			

* This file should be maintained and updated regularly by the firm



Monthly Pacing Guide for Firms & Employees 2013-2014

	Timeframe	<u>MONTHLY (FIRM)</u>	VE Curric. Task #	Suggested Resources
Monthly (Firm)	1st	Pay rent	ACCT 12	REF: Cash Receipts & Cash Payments Journal*
	1st	Pay utilities	ACCT 12	REF: Cash Receipts & Cash Payments Journal*
	1st / last	Make a loan payment (if nec.)	ACCT 7, 12	REF: Cash Receipts & Cash Payments Journal*, REF: Loan Payment Table*
	1st	Prepare payroll and pay employee salaries (16th-last)	ACCT 13	REF: Payroll Register with Explanations*
	Due on 15th	Prepare and submit Form 941 and pay appropriate payroll taxes and withholdings	ACCT 13	REF: Payroll Register with Explanations*, SUBMIT: Withholding Tax Form 941
	Due on 15th	Prepare and submit the quarterly sales tax return	ACCT 9	REF: Sales Tax Form, SUBMIT: VEC State and Local Sales Tax Return
	16th	Prepare payroll and pay employee salaries (1st - 15th)	ACCT 13	REF: Payroll Register with Explanations*
		Reconcile the Bank Account and Cash Journal	ACCT 14	REF: Cash Receipts & Cash Payments Journal*
		Update the Accounts Receivable report	ACCT 8	REF: Sales Journal & Accts Receivable Record
		Manage inventory levels	ACCT 15, SLS-MKT 15	REF: Inventory Record*
		Create monthly sales report	ACCT 8, SLS-MKT 15	REF: Sales Journal & Accts Receivable Record
		Create monthly website analytics report		
		Create monthly financial statements:		REF: Financial Statement Templates with Explanations
		Income Statement		REF: Sales Journal
		Balance Sheet		REF: Asset Log*
	Cash Budget		REF: Cash Budget*	
	Timeframe	<u>MONTHLY (EMPLOYEE)</u>	Pers. Fin Task #	Suggested Resources
Monthly (Employee)	1st	Pay personal budget expenses	PERS FIN 7	
		(Rent, transportation, insurance, groceries, monthly utilities [cell phone, cable, internet, electric, gas, etc])		
	Throughout	Make personal spending purchases	PERS FIN 8	
	Throughout	Review paycheck and paystub, make deposits	PERS FIN 6	
	Regularly	Update your Checkbook Register	PERS FIN 5	
	1st for prev.	Reconcile your personal Bank Account and Checkbook Register	PERS FIN 9	
		Compile and save all invoices and transaction receipts		
	End	Create a monthly budget report		