

Course Outline

Marketing, Sales, and Service

REVISED: July/2021

Job Title

Customer Service Representative

Career Pathway:

Professional Sales

Industry Sector:

Marketing, Sales, and Service

O*NET-SOC CODE:

43-4051.00

CBEDS Title:

Customer Service

CBEDS No.:

4119

71-60-40

Customer Service Basics

Credits: 0

Hours: 12

Course Description:

This competency-based course provides students in providing customer services to a variety of industry environments. Emphasis is based on communication, dealing with irate customers, knowing the customer and fundamental customer service strategies. The competencies in this course are aligned with the California High School Academic Content Standards and the California Career Technical Education Model Curriculum Standards.

Prerequisites:

None.

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

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



COURSE OUTLINE COMPETENCY-BASED COMPONENTS

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

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

COURSE OUTLINE COMPONENTS

LOCATION

GOALS AND PURPOSES

Cover

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

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

PERFORMANCE OBJECTIVES OR COMPETENCIES

pp. 7-12

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

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

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

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

COURSE OUTLINE COMPETENCY-BASED COMPONENTS

(continued)

INSTRUCTIONAL STRATEGIES

p. 14

Instructional techniques or methods could include laboratory techniques, lecture method, small-group discussion, grouping plans, and other strategies used in the classroom.

Instructional strategies for this course are listed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructional strategies and activities for a course should be selected so that the overall teaching approach takes into account the instructional standards of a particular program, i.e., English as a Second Language, Programs for Adults with Disabilities.

UNITS OF STUDY, WITH APPROXIMATE HOURS ALLOTTED FOR EACH UNIT

pp. 6-11

The approximate time devoted to each instructional unit within the course, as well as the total hours for the course, is indicated. The time in class is consistent with the needs of the student, and the length of the class intended to ensure the student will learn at an optimum level.

Units of study, with approximate hours allotted for each unit are listed in the COMPETENCY AREA STATEMENT(S) of the course outline. The total hours of the course, including work-based learning hours (community classroom and cooperative vocational education) is listed on the cover of every CBE course outline. Each Competency Area listed within a CBE outline is assigned hours of instruction per unit.

EVALUATION PROCEDURES

p. 14

The evaluation describes measurable evaluation criteria clearly within the reach of the student. The evaluation indicates anticipated improvement in performances as well as anticipated skills and competencies to be achieved.

Evaluation procedures are detailed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructors monitor students' progress on a continuing basis, assessing students on attainment of objectives identified in the course outline through a variety of formal and informal tests (applied performance procedures, observations, and simulations), paper and pencil exams, and standardized tests.

REPETITION POLICY THAT PREVENTS PERPETUATION OF STUDENT ENROLLMENT

Cover

After a student has completed all the objectives of the course, he or she should not be allowed to reenroll in the course. There is, therefore, a need for a statement about the conditions for possible repetition of a course to prevent perpetuation of students in a particular program for an indefinite period of time.

ACKNOWLEDGMENTS

Thanks to Aaron Saenz for developing and editing this curriculum. Acknowledgment is also given to ERICA ROSARIO for designing the original artwork for the course covers.

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CALIFORNIA CAREER TECHNICAL EDUCATION MODEL CURRICULUM STANDARDS

Marketing, Sales, and Services Knowledge and Performance Anchor Standards

1.0 Academics

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

2.0 Communications

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

3.0 Career Planning and Management

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

4.0 Technology

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

5.0 Problem Solving and Critical Thinking

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

6.0 Health and Safety

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

7.0 Responsibility and Flexibility

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

8.0 Ethics and Legal Responsibilities

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

9.0 Leadership and Teamwork

Work with peers to promote divergent and creative perspectives, effective leadership, group dynamics, team and individual decision making, benefits of workforce diversity, and conflict resolution as practiced in the DECA career technical student organization

10.0 Technical Knowledge and Skills

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

11.0 Demonstration and Application

Demonstrate and apply the knowledge and skills contained in the Marketing, Sales, and Services anchor standards, pathway standards, and performance indicators in classroom, laboratory and workplace settings, and through the DECA career technical student organization.

Marketing, Sales, and Services Pathway Standards

A. Marketing Pathway

Using both creative and systems processes, develop marketing concepts and principles and their practical application in marketing and management. Subject matter includes market research, economics, marketing budgets, creative development and design, and marketing foundations/functions with emphasis on public relations, advertising, branding, promotion, product/service management, pricing and distribution. Specialized programs of study in this field may include sports marketing, hospitality marketing, advertising or market research.

Sample occupations associated with this pathway:

- ◆ Advertising Account Representative
- ◆ Advertising Sales Manager
- ◆ Market Research Analyst
- ◆ Marketing Manager
- ◆ Public Relations Specialist

- A1.0 Demonstrate an understanding of business fundamentals, uses and application of technologies, communications, and basic management functions.
- A2.0 Demonstrate an understanding of basic economic concepts, economic systems, cost-profit relationships, economic indicators and trends, as well as international concepts.
- A3.0 Demonstrate the importance of legal, ethical and financial issues in business marketing decisions.
- A4.0 Implement the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business-marketing decisions.
- A5.0 Demonstrate an understanding of the nature and scope of the product/service management function, quality assurance, product mix, positioning, and other market product considerations.
- A6.0 Demonstrate an understanding of the concepts and processes needed to move, store, locate, and/or transfer ownership of goods and services.
- A7.0 Demonstrate an understanding of product and institutional promotion through advertising, publicity/public relations, promotional sales, e-commerce, using product, services, images and ideas to achieve a desired outcome.
- A8.0 Demonstrate an understanding of the process of establishing and communicating the value or cost of goods and services, the nature and scope of pricing concepts, and the strategies and outcomes of pricing.

CBE
Competency-Based Education

COMPETENCY-BASED COMPONENTS
for the Customer Service Basics Course

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>A. INTRODUCTION TO CUSTOMER SERVICE</p> <p>Describe and define customer service, demonstrate aspects of a customer friendly attitude and learn about safety in the customer service field.</p> <p>(1 Hours)</p>	<ol style="list-style-type: none"> 1. Define Customer Service. 2. Describe a customer-centric mindset. 3. Describe and classify types of customers. 4. Define internal customers. 5. Define external customers. 6. List five areas where customer service takes place. 7. Define what internal definition of customer service. 8. List characteristics of unpleasant customer service experiences in your life. 9. List characteristics of satisfying customer service experiences. 10. List and demonstrate the aspects of a customer friendly attitude. 11. Define leadership and identify the responsibilities, competencies, and behaviors of successful leaders. 12. Identify the characteristics of successful teams, including leadership, cooperation, collaboration, and effective decision-making skills as applied in groups, teams, and career technical student organization activities. 13. Define and learn about safety in the customer service field. 14. Pass a safety test with 100%. 	<p>Career Ready Practice: 1, 2, 5, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1 Career Planning and Management: 3.6 Ethics and Legal Responsibilities: 8.4, 8.5, 8.6 Leadership and Teamwork: 9.1, 9.2 Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.5 Demonstration and Application: 11.1</p> <p>CTE Pathway: B3.3, B3.7, B4.1, B4.6, B6.1, B7.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>B. COMMUNICATION SKILLS</p> <p>Define and demonstrate effective communication, a professional image, verbal and non-verbal communication and the benefits of a positive attitude when interacting with customers.</p> <p>(2 Hours)</p>	<ol style="list-style-type: none"> 1. Describe effective communication skills. 2. Define professionalism and professional image. 3. Define and describe non-verbal communication. 4. Define and describe body language. 5. List key aspects of body language. 6. Compare and contrast word choices such as, "Please," "Thank you," "May I," etc. 7. Describe why tone of voice, volume, pace, and inflection are important in customer service. 8. Describe why having a positive attitude is important in customer service. 9. Describe how cultural/ethnic/generational differences affect interpersonal interactions/communications within a business structure. 	<p>Career Ready Practice: 1, 2, 5, 7, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3, 2.5, 2.6 Technology: 4.1 Responsibility and Flexibility: 7.2, 7.3, 7.7 Ethics and Legal Responsibilities: 8.4, 8.5, 8.6, 8.8 Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.5, 10.8, 10.9, 10.13</p> <p>CTE Pathway: B3.1, B3.7, B4.1, B4.3, B4.6</p>
<p>C. KNOWING YOUR CUSTOMER</p> <p>Understand the nature and scope of the functions associated with customer service strategies, product knowledge, support activities.</p>	<ol style="list-style-type: none"> 1. List the key attributes of your customer (drives, needs, wants). 2. Describe customer expectations. 3. Identify the techniques and strategies used to foster positive, ongoing relationships with customers and the importance of customer service to the business' bottom line. 4. Define and describe behavioral styles: <ol style="list-style-type: none"> a. Results Orientated b. Detail Orientated c. People Orientated 5. Understand that the modern world is an international community and requires an expanded global view. 6. Respect individual and cultural differences and recognize the importance of diversity in the workplace. 	<p>Career Ready Practice: 1, 4, 5, 7, 9</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.5 Problem Solving and Critical Thinking: 5.1 Ethics and Legal Responsibilities: 8.4, 8.5, 8.6</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(2 Hours)		<p>Leadership and Teamwork: 9.5, 9.6</p> <p>Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.5, 10.8, 10.9, 10.13</p> <p>CTE Pathway: B3.3, B4.1, B4.3, B4.6</p>
<p>D. WORKING WITH IRATE CUSTOMERS</p> <p>Define and demonstrate techniques for calming upset customers.</p>	<ol style="list-style-type: none"> 1. Describe what makes customers upset. 2. Define and apply techniques methods of preventing customer upset. 3. List and demonstrate 5 key steps to calming upset customers: <ol style="list-style-type: none"> a. Accurately identify the problem. b. Confirm the customer’s value. c. Synchronize and summarize. d. Conclude by affirming the customer’s value again. e. Implement personal de-escalation methods. 4. Participate in interactive teamwork to solve real Marketing, Sales, and Services sector issues and problems centering on calming upset customers. 	<p>Career Ready Practice: 1, 2, 5, 6, 7, 8, 9, 11</p> <p>CTE Anchor:</p> <p>Academics: 1.0</p> <p>Communications: 2.1, 2.2, 2.3</p> <p>Technology: 4.1</p> <p>Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4</p> <p>Health and Safety: 6.2</p> <p>Responsibility and Flexibility: 7.2, 7.3, 7.7</p> <p>Ethics and Legal Responsibilities: 8.4, 8.5, 8.6, 8.8</p> <p>Leadership and Teamwork: 9.7</p> <p>Technical Knowledge and Skills:</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(2 Hours)		10.1, 10.2, 10.3, 10.5, 10.8, 10.9, 10.13 Demonstration and Application: 11.1 CTE Pathway: B3.3, B3.5, B4.1, B4.3
E. TELEPHONE CUSTOMER SERVICE SKILLS Describe and demonstrate strategies to assist customers over the telephone.	<ol style="list-style-type: none"> 1. Describe and demonstrate a professional greeting. 2. Define active listening. 3. Describe and demonstrate the professional way of putting customers on hold. 4. Describe and demonstrate professional ways to transition a call. 5. Describe and demonstrate professional ways to take a message. 6. Describe and demonstrate professional ways to leave a voicemail. 7. Describe and demonstrate professional ways to end a call. 8. Participate in interactive teamwork to solve real Marketing, Sales, and Services sector issues and problems utilizing telephone-based customer skills. 	Career Ready Practice: 1, 2, 4, 5, 7, 8, 9, 10, 11 CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.2 Responsibility and Flexibility: 7.2, 7.3, 7.7 Ethics and Legal Responsibilities: 8.4, 8.5, 8.6, 8.8 Leadership and Teamwork: 9.7 Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.5, 10.8, 10.9, 10.13 Demonstration and Application: 11.1

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(2 hours)		CTE Pathway: B3.3, B3.5, B4.1, B4.3, B4.6, B5.2
F. INTERNET CUSTOMER SERVICE SKILLS Describe and demonstrate strategies to assist customers over the internet.	<ol style="list-style-type: none"> 1. List and define the attributes of the internet customer. 2. Describe e-mail communication guidelines. 3. Describe internet customer skills. 4. Create scripted responses. 5. Create an auto response. 6. Describe the importance of creating an FAQ sheet. 7. Participate in interactive teamwork to solve real Marketing, Sales, and Services sector issues and problems utilizing internet-based customer skills. 8. Review and complete the LAUSD Acceptable Use Policy. 	Career Ready Practice: 1, 2, 4, 5, 7, 8, 9, 10, 11 CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3, 2.4, 2.5 Technology: 4.1, 4.2, 4.6 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.2 Responsibility and Flexibility: 7.2, 7.3, 7.7 Ethics and Legal Responsibilities: Leadership and Teamwork: 9.7 Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.5, 10.8, 10.9, 10.13 Demonstration and Application: 11.1 CTE Pathway: B3.3, B3.5, B4.1, B4.3, B4.6, B5.3
(1 hour)		

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>G. STRESS MANAGEMENT STRATEGIES</p> <p>Define and describe stress, stressors and stress management techniques.</p> <p>(1 hour)</p>	<ol style="list-style-type: none"> 1. Define and describe stress, stressors, and stress management. 2. Describe what causes personal stress. 3. List personal stress symptoms. 4. Describe methods of limiting or eliminating personal stress. 	<p>Career Ready Practice: 1, 5, 6, 7, 12</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.6 Career Planning and Management: 3.1, 3.2 Health and Safety: 6.2</p> <p>CTE Pathway: B3.5</p>
<p>H. PERSONAL LEADERSHIP & EMPLOYABILITY SKILLS</p> <p>Work with peers to promote divergent and creative perspectives, effective leadership, group dynamics, team and individual decision-making, benefits of workforce diversity, and conflict resolution. Learn how to identify and apply for promotional opportunities in your career.</p> <p>(1 hour)</p>	<ol style="list-style-type: none"> 1. Define leadership and identify the responsibilities, competencies, and behaviors of successful leaders. 2. Identify the characteristics of successful teams, including leadership, cooperation, collaboration, and effective decision-making skills as applied in groups, teams, and career technical student organization activities. 3. Identify the skills required to advance in your career and apply for promotional opportunities. 	<p>Career Ready Practice: 1, 5, 6, 7, 12</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.6 Leadership and Teamwork: 9.1, 9.2 Technical Knowledge and Skills: 10.1</p> <p>CTE Pathway: B3.5</p>

SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES

TEXTBOOKS

Gibson, Pattie. The World of Customer Service, 3rd Edition, Cengage Learning, 2011.

Evenson, Rene. Customer Service 101: Quick and Easy Techniques that get Great Results, 3rd Edition, Amacom, 2017

RESOURCES

Employer Advisory Board members

Employment Development Department

LAUSD Acceptable Use Policy

CDE Model Curriculum Standards for Marketing, Sales and Service
<https://www.cde.ca.gov/ci/ct/sf/documents/mktsaleservices.pdf>

COMPETENCY CHECKLIST

TEACHING STRATEGIES and EVALUATION

METHODS AND PROCEDURES

- A. Lectures and discussion
- B. Online Demonstrations
- C. Individualized instruction/Online support
- D. Multimedia presentations
- E. Critical thinking and listening skills

EVALUATION

SECTION A – Introduction to Customer Service – Pass all assignments with a minimum score of 80% or higher.

SECTION B- Communication Skills – Pass all assignments with a minimum score of 80% or higher.

SECTION C – Knowing Your Customer - Pass all assignments with a minimum score of 80% or higher.

SECTION D – Working withirate Customers - Pass all assignments with a minimum score of 80% or higher.

SECTION E – Telephone Customer Service Skills - Pass all assignments with a minimum score of 80% or higher.

SECTION F – Internet Customer Service Skills - Pass all assignments with a minimum score of 80% or higher.

SECTION G – Stress Management Strategies - Pass all assignments with a minimum score of 80% or higher

SECTION H – Personal Leadership & Employability Skills - Pass all assignments with a minimum score of 80% or higher.

Standards for Career Ready Practice

1. Apply appropriate technical skills and academic knowledge.

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

2. Communicate clearly, effectively, and with reason.

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

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

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

4. Apply technology to enhance productivity.

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

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

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

6. Practice personal health and understand financial literacy.

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

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

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

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

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

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

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

10. Demonstrate creativity and innovation.

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

11. Employ valid and reliable research strategies.

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

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

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

Statement for Civil Rights

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