

Appendix C

RECOMMENDATIONS FOR RELATED TECHNICAL CLASSROOM INSTRUCTION FOR FINANCE YA

These recommendations are intended to be used by the Local YA Consortium when determining appropriate related technical instruction for Finance YA. It is not all inclusive but should be used to assist the partnership with identification and/or development of course work that supports the work-based competencies as identified in the Skill Standards Checklist. As with all YA programs the consortium must ensure that the related instruction meets with the approval of their administration and school board.

OPERATIONAL NOTES

- Related Technical Classroom Instruction maybe offered by the employer, within the school district, at another school district, at a Wisconsin Technical College, and/or at a Community College or University by instructors qualified according to the Youth Apprenticeship Program Operations Manual. Commercial programs, such as the Center for Financial Training, www.cftusa.org/bank-training.html, or Employer provided classroom certification programs are also appropriate provided that the student receives high school credit towards graduation for the class work.
- Learning Objectives are the foundation of related technical classroom instruction. Consortiums may teach using locally developed coursework, however, statewide advanced standing and/or transcribed agreements may not apply. It is recommended then that local agreements with technical colleges be pursued. Statewide advanced standing and/or transcribed credit will be based on this Recommended Instruction list.
- A minimum of 180 hours (2 semesters) of related technical instruction is required for each one year YA program with 250 of the **work** hours coinciding with the instruction. The student must also receive high school credit towards graduation for this instruction, no matter the provider.
- It is suggested that an Introduction to Finance Careers and Computer Applications class be provided as a pre-requisite for students interested in this youth apprenticeship. Additionally, students should complete a job shadow prior to enrollment in the Finance YA program.
- Courses chosen should coincide as much as possible to occupational program requirements if the student intends to continue in the Wisconsin Technical College System or University of Wisconsin system.
- Recommendations for this Appendix were obtained from Employer and YA Consortium/School District Coordinator input during the YA Finance Program Survey and YA Regional Meetings, December 2007 through April 2008, and through the States' Career Clusters recommendations at <http://www.careerclusters.org/>- Funded in part by the U.S. Department of Education.



Finance Youth Apprenticeship (YA) Plan of Study

NAME: _____ DATE: _____

The Finance Youth Apprenticeship Pathway Units and Related Technical Instruction course selection and delivery are entirely within local consortium control. The recommendations listed below are only a suggested path of YA Finance career planning and should be individualized to meet each learner’s educational and career goals. All plans should meet high school graduation requirements, as well as, college entrance requirements if applicable.

HIGHLY Recommended for ALL Finance YA students

Educational Level	Grade	English/ Language Arts 4 required	Social Studies Social Sciences 3 Required	Math 2 Required	Science 2 Required	Career Pathway Courses (Electives)	Recommended Enhancement Electives or Activities
Secondary	9	Oral Communications (Speech)		Algebra		Computer Applications- Business Applications	DECA or FBLA
	10					Computer Applications- Spreadsheets	DECA or FBLA Entrepreneurship Club Leadership
	11						Finance Youth Apprenticeship - Level One or Two <ul style="list-style-type: none"> • Employability Skills • Customer Service • Marketing • Accounting • Principles of Business, Banking, and/or Finance • Business Management • Consumer Education • Employer or Commercial Certification programs
	12		Business Law				

Post-Secondary Occupational Opportunities

The chart below shows examples of career ladders organized by pathway.

For additional career cluster information, visit www.careerclusters.org

For additional career information on a specific occupation, visit <http://wiscareers.wisc.edu/> or <http://worknet.wisconsin.gov/worknet/default.aspx>

		High School Diploma, On-the-Job Training	Certificate, Licensing, and/or Associate's Degree (1-2 years college)	Bachelor's/Master's Degree (4 year college)
		Finance Pathways		Assistant Brokerage Clerk
Accounting Clerk Bookkeeper Cashier Payroll Clerk	Accounting Assistant Accountant			Accountant Auditor Bank /Financial Examiners Controller Tax Examiner/Collectors
Bill & Account Collector Credit Clerks Loan Clerk New Accounts Clerk Teller	Loan Officer Teller/Operations Supervisor			Auditor Branch/Department Manager Credit Analyst Loan Officer
Auto Appraiser Claims Clerk Policy Processors	Claims Adjuster Claims Investigator Insurance Examiners Insurance Sales Agent Property Appraiser			Actuary Insurance Sales Agent Underwriter

SOURCES: The States' Career Clusters Initiative, 2008, www.careerclusters.org; The Oklahoma Department of Career & Technology Education, 2007; Waukesha County Technical College (WCTC), Susan Maresh, Waukesha County School-to-Work, 2007.