



# INDIVIDUAL CASE STUDY EVENTS

CORPORATE FINANCE  
ENTREPRENEURSHIP OPERATIONS  
FASHION MERCHANDISING AND MARKETING  
FINANCIAL ACCOUNTING  
HOTEL AND LODGING  
HUMAN RESOURCE MANAGEMENT  
MARKETING MANAGEMENT  
RESTAURANT AND FOOD SERVICE MANAGEMENT  
RETAIL MANAGEMENT  
SALES MANAGEMENT AND LEADERSHIP  
TRAVEL AND TOURISM

Collegiate DECA's **Individual Case Study Events** effectively measure the student's proficiency in the knowledge and skills identified by business and industry professionals 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 Case Study 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 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 Individual Case Study Events. Each event takes the comprehensive exam named for that category.

### BUSINESS MANAGEMENT + ADMINISTRATION

**Human Resource Management:** Students are challenged with analyzing a real-world case study situation involving one or more human resource issues in any type of business or organization.

**Retail Management:** Students are challenged with analyzing a real-world case study situation involving marketing and management functions and tasks in any retail establishment.

### ENTREPRENEURSHIP

**Entrepreneurship Operations:** Students are challenged with analyzing a real-world case study situation involving daily operations of entrepreneurship, which many include human resources, cash flow management and customer service management.

### FINANCE

**Corporate Finance:** Students are challenged with analyzing a real-world case study situation involving financial concepts and how those concepts apply to the disciplines of investment and corporate finance in both business enterprises and financial services institutions.

**Financial Accounting:** Students are challenged with analyzing a real-world case study situation involving financial accounting concepts.

## LEARNING OUTCOMES

Students will demonstrate knowledge and skills described by 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.

Through participating in these events, students will:

- Demonstrate knowledge and understanding of general business concepts and industry-specific concepts
- Analyze situations, organize thoughts and identify solutions
- Apply business principles and techniques to the specific industry and organizational environment
- Organize and communicate ideas and concepts effectively

## 21<sup>ST</sup> CENTURY SKILLS

Students 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

**Hotel and Lodging:** Students are challenged with analyzing a real-world case study situation involving marketing and management functions and tasks in any business enterprise primarily engaged in providing lodging, food and beverage services, special events and meeting space.

**Restaurant and Food Service Management:** Students are challenged with analyzing a real-world case study situation involving marketing and management functions and tasks in a restaurant or a food service business.

**Travel and Tourism:** Students are challenged with analyzing a real-world case study situation involving marketing and management functions and tasks in any business enterprise primarily engaged in satisfying the desire of people to make productive or enjoyable use of travel services.

## MARKETING

**Fashion Merchandising and Marketing:** Students are challenged with analyzing a real-world case study situation involving marketing and management functions and tasks in retail establishments, wholesale establishments and manufacturing firms primarily engaged in the merchandising and marketing of clothing and related articles for personal wear.

**Marketing Management:** Students are challenged with analyzing a real-world case study situation involving marketing and/or management. Environments may include, but are not limited to, place/location marketing, transportation marketing, charity/event marketing, marketing research, strategic marketing planning, distribution strategies, target marketing and Internet marketing.

**Sales Management and Leadership:** Students are challenged with analyzing a real-world sales management case study situation, developing strategies to handle the situation, then conducting a meeting with one or more people with experience in sales.

## EVENT OVERVIEW

- Individual Case Study Events consist of two major parts: a **comprehensive exam** and one preliminary **case study** event. A second case study event will be given to finalists.
- The maximum score for the evaluation is 100 points. The case study will be weighted twice (2 times) the value of the exam score. The exam score carries forward into the final round of competition.

## COMPREHENSIVE EXAM

- The comprehensive exam consists of **100 multiple-choice questions**. Students are allowed **90 minutes** to complete the exam.
- The comprehensive exam questions are developed based on performance indicators within each instructional area.
- Five exams are used across the Individual Case Study Events based on the career clusters and event definitions above.

## CASE STUDY PRESENTATION

- The student will be given a **case study** in which the student must develop a solution by translating what they have learned into effective, efficient and spontaneous action. The role of the student and of the judge will be determined by the specific case study situation.
- Each student will have **30 minutes** for analyzing the situation and organizing a response and interaction.
- A list of performance indicators specific to the case study situation is included in the participant's instructions. These are distinct tasks the student must accomplish within the case study solution. The judge will evaluate the student's performance on these **performance indicators, 21<sup>st</sup> Century Skills** and **follow-up questions**.
- Students may not consult anyone about the case study situation. Any cell phone use, text messaging, email, etc. is prohibited during the entire competitive event.
- A personal or laptop computer/hand-held digital organizer may be used when appropriate. Students must use battery power for the prep time and presentation, even if there are electrical outlets in the room. Such digital organizers may be prepared ahead of time (i.e., standard headings for PowerPoint presentation) provided there is no reference to the specific event situation.
- Students are allowed to bring reference materials to use in preparing their presentation. This may include electronic (such as CD encyclopedias) as well as print materials (such as magazines or textbooks).
- Students may utilize the Internet during both prep and presentation times. The availability of Internet service is the responsibility of the students.
- Only materials that can be easily carried to and from the prep and judging areas will be permitted. This includes any computer equipment, visual aids, reference materials, etc. Only the students themselves may handle and set up their material. No outside assistance will be allowed.
- No specified set-up time will be allowed. All set up will be part of the allotted presentation time. Timing will begin when the students enter the judging area (i.e., judge booth).
- Students may bring materials to develop visual aids to assist them in their presentation. The supplies may consist of poster paper, flip charts, blank paper, art supplies, etc. Such visual aids may be prepared ahead of time (i.e., standard headings on a flip chart) provided there is no reference to the specific event situation.
- Materials appropriate for the situation may be handed to or left with the judge. Materials handed to the judge must be created using materials allowed during the designated preparation period.
- A **15-minute** time limit will be given for students to interact with a judge. This time limit includes time for the students to present to the judge and to respond to any questions. Students will be allowed to use notes made only during the interaction and during the time allowed for preparation.
- When using a presentation aid, such as a laptop computer, the noise level must be kept at a conversational level that does not interrupt other students. If this guideline is not followed, the student will be interrupted (during the prep or presentation time) and asked to follow the noise policy.
- Competitors are also responsible for following the information provided in the Collegiate DECA General Rules and Regulations for competition.
- All materials, equipment, supplies, etc. must be provided by the students. DECA assumes no responsibility for damage/loss of materials, equipment, supplies, etc.
- Failure to follow guidelines may result in disqualification.



1 PARTICIPANT



CLUSTER  
SPECIFIC EXAM



1 CASE STUDY



30 MINUTES  
PREPARATION TIME



15 MINUTES  
INTERVIEW TIME

## PRESENTATION JUDGING

- The student will be given a **case study** in which the student must develop a solution by translating what they have learned into effective, efficient and spontaneous action. The role of the student and of the judge will be determined by the specific case study situation.
- Each student will have **30 minutes** for analyzing the situation and organizing a response and interaction.
- You will then interact with the student for up to **15 minutes**. This includes time for the students to present to you based on the case study situation, and for you to make comments and ask questions.
- Students will be evaluated according to a specific evaluation form accompanying the case study.
- To ensure fairness, judges should develop two to three standard questions, based on the specific case, which will be asked of each student. When developing the questions, please consider that the students have to respond spontaneously. After asking the standard questions you may ask other questions for clarification specific to the current student.
- After the presentation/interaction with the student is completed, please thank the student but give no indication of the student's performance/score. If appropriate to the situation, please state that a decision will be made soon and that the student will be notified of the decision.
- To ensure fairness, at no time should students be asked where they are from (school, state, country, etc.).
- After the student is excused from the judging area, you have **5 minutes** to score the student. Refer to the Evaluation Criteria section for the guidelines. On the bubble sheet provided, please bubble in the appropriate score and write the score on the corresponding line to verify accuracy.
- Please make sure not to exceed the maximum score possible for each item. Please make sure to score all categories, add them for the total score, then initial the total score. The maximum score for the evaluation is 100 points.

## JUDGING SUMMARY

An average score of 70 or better, when combined with the comprehensive exam will earn the student a Certificate of Excellence.

Thank you for volunteering your time to evaluate our emerging leaders and entrepreneurs.

## EVALUATION CRITERIA

A score under the heading

**Exceeds Expectations** in any category means that, in your opinion, the presentation/interaction is handled in an effective, creative way; in effect, nothing more could be expected of the student, and the decisions/recommendations have been presented well.

A score under the heading **Meets**

**Expectations** in any category means that, in your opinion, the presentation/interaction is handled well. There may be a few minor problems or omissions, but they are not significant. A presentation/interaction which earns this level in every category would be considered a strong presentation/interaction.

A score under the heading

**Below Expectations** or **Little/**

**No Demonstration** in any category means that some major flaw has been noted which damages the effectiveness of the presentation/interaction. This may be a major omission, a serious misstatement or any other major flaw.