79-90-70
Warehouse Operations: Forklift Operator (Fundamentals)

Credits: 15
Hours: 180

Course Description:
This competency-based course provides students with entry-level skills for the modern material-handling trades. Training includes warehousing, storekeeping, industrial safety; the uses and purposes of various types of material-handling equipment, such as gas and electric forklifts, straddle-arm stackers, transporters and tow motors. 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.
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; SCCR 10508 [b]; Adult Education Handbook for California [1977], Section 100)

**COURSE OUTLINE COMPONENTS**

**GOALS AND PURPOSES**

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**

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 and 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.
INSTRUCTIONAL STRATEGIES

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

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 should be that it ensures 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

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

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 PAUL PIDOUX and MARCELA BAKER for developing and editing this curriculum. Acknowledgment is also given to ERICA ROSARIO for designing the original artwork for the course covers.

ANA MARTINEZ
Specialist
Career Technical Education

ROSARIO GALVAN
Administrator
Division of Adult and Career Education

APPROVED:

JOE STARK
Executive Director
Division of Adult and Career Education
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 Transportation academic alignment matrix for identification of standards.

2.0 Communications
Acquire and accurately use Transportation 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 Transportation 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 Transportation 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 Transportation 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 Transportation 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 SkillsUSA career technical student organization.

10.0 Technical Knowledge and Skills
Apply essential technical knowledge and skills common to all pathways in the Transportation 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 Transportation anchor standards, pathway standards, and performance indicators in classroom, laboratory, and workplace settings, and through the SkillsUSA career technical student organization.
**Transportation**  
*Pathway Standards*

A. Operations Pathway  
The Operations pathway prepares students for postsecondary employment and education in a variety of career opportunities in the transportation industry, including but not limited to harbors, ports, warehousing, marine applications, airplanes, trains, vehicles, and specialty equipment.

Sample occupations associated with this pathway:  
- Warehouse Worker/Dispatcher  
- Production, Planning, and Expediting Clerk  
- Storage, Warehouse, and Distribution Manager  
- Container Crane Operator  
- Inspectors and Planners

A1.0 Evaluate and assess all aspects of facilities and facility planning for efficient and effective processing/handling of people, goods, and services in the transportation industry (housing, storage, maintenance, parts).

A2.0 Describe and identify tools, techniques, and systems used to plan, staff, lead, and organize human resources as it relates to the transportation sector.

A3.0 Demonstrate an understanding of the concepts and processes needed to move, store/house, locate, and/or transfer people, goods, and services.

A4.0 Demonstrate an understanding of business fundamentals, uses and application of technologies, communications, and basic management functions.

A5.0 Analyze and evaluate the design advantages and disadvantages of transportation-industry systems and the effects of those systems on people and the environment.

A6.0 Demonstrate safety practices pertaining to the transportation industry, including requirements of the Occupational Safety and Health Administration (OSHA), Environmental Protection Agency (EPA), Air Quality Management Districts (AQMDs), and other regulatory agencies.

A7.0 Describe and identify the infrastructures required and used in the transportation industry.
## CBE
**Competency-Based Education**

### COMPETENCY-BASED COMPONENTS
for the *Warehouse Operations: Forklift Operator (Fundamentals)* Course

<table>
<thead>
<tr>
<th>COMPETENCY AREAS AND STATEMENTS</th>
<th>MINIMAL COMPETENCIES</th>
<th>STANDARDS</th>
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</table>
| **A. ORIENTATION/INTRODUCTION** | 1. Know the basic content of the course.  
2. Know general historical development of warehousing.  
3. Know uses and purposes of separate warehousing procedures.  
4. Describe classroom rules and procedures. | **Career Ready Practice:**  
1, 3, 7  
**CTE Anchor:**  
Communications: 2.1, 2.3  
Career Planning and Management: 3.5  
Technical Knowledge and Skills: 10.1  
**CTE Pathway:**  
A2.3, A2.5, A7.4 |

(8 hours)

| **B. SAFETY** | 1. Identify warning and protective devices.  
2. Demonstrate industrial safety practices.  
3. Pass the preliminary safety test with 100% accuracy.  
4. Pass Industrial Hazards Test with 100% accuracy.  
6. Pass T.O.P.S. test with 100% accuracy. | **Career Ready Practice:**  
1, 3, 6  
**CTE Anchor:**  
Communications: 2.1, 2.3  
Problem Solving and Critical Thinking: 5.1  
Health and Safety: 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 6.7  
Ethics and Legal Responsibilities: 8.1, 8.2, 8.3, 8.4  
Technical Knowledge and Skills: 10.1, 10.2 |

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### C. PRINCIPLES OF MODERN WAREHOUSING

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| Know the fundamentals of warehouse organization. 
Demonstrate organizational flow charts. |
| 1. Know warehouse uses of one-story type building. 
2. Demonstrate use of direct-flow assembly line practices. 
3. Identify use of pallets and material handling equipment. 
4. Demonstrate use of effective warehouse and storage layout plan. 
5. Balance manpower and equipment. 
6. Identify the purpose of each piece of material handling equipment. |
| **Career Ready Practice:** 1, 3, 5, 10 |
| **CTE Anchor:** 
Communications: 2.1, 2.2, 2.3 
Career Planning and Management: 3.4, 3.5 
Technology: 4.5 
Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 
Health and Safety: 6.6 
Responsibility and Flexibility: 7.4, 7.5 
Technical Knowledge and Skills: 10.1, 10.2 |

### D. PRINCIPLES OF SPACE LAYOUT

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| Demonstrate the ability to handle, locate, and layout supplies and equipment using standard procedures. 
Demonstrate the ability to handle, and relocate supplies and equipment using non-standard procedures. |
| 1. Demonstrate maximum utilization of space. 
2. Practice protection of supplies and equipment. 
3. Identify commodity factors. 
4. Identify capacity factors. 
5. Know layout of aisles. 
6. Identify layout factors. 
| **Career Ready Practice:** 1, 3, 5, 10 |
| **CTE Anchor:** 
Communications: 2.1, 2.2, 2.3 
Technology: 4.1 
Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 
Health and Safety: 6.6, 6.7 |
### E. IDENTIFICATION OF STORAGE AREAS

Know the various storage areas and symbols. Create emergency storage areas and symbols.

| 1. | Identify bulk locations. |
| 2. | Identify rack locations. |
| 3. | Interpret identification symbols. |
| 4. | Identify available storage locations. |
| 5. | Identify bin locations. |
| 6. | Pass storage examination with 100% accuracy. |

**Career Ready Practice:**
1, 3, 5, 10

**CTE Anchor:**
- Communications: 2.1, 2.2, 2.3
- Technology: 4.1
- Health and Safety: 6.6, 6.7
- Responsibility and Flexibility: 7.5
- Technical Knowledge and Skills: 10.1, 10.2

**CTE Pathway:**

### F. PROCESSING AND PREPARING RECEIPTS FOR STORAGE

Demonstrate the ability to check all documents normally used in warehouse work. Simulate receiving and processing.

| 1. | Demonstrate ability to check delivery documents. |
| 2. | Know how to check purchase orders against receipts. |
| 3. | Determine quantity received. |
| 4. | Identify overage, shortage, and damage. |
| 5. | Know how to contact vendors. |
| 6. | Know how to write grief letters. |
| 7. | Receive merchandise with 100% accuracy. |

**Career Ready Practice:**
1, 3, 7, 11

**CTE Anchor:**
- Communications: 2.1, 2.2, 2.3, 2.4, 2.5, 2.6
- Technology: 4.1, 4.2, 4.3, 4.4
- Problem Solving and Critical Thinking: 5.1, 5.2, 5.3
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<td><strong>Responsibility and Flexibility:</strong></td>
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<td><strong>CTE Pathway:</strong></td>
<td>A2.2, A2.3, A2.4, A2.7, A3.5, A3.7</td>
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<td><strong>(12 hours)</strong></td>
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<td><strong>G. STOCK LOCATOR SYSTEM</strong></td>
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<td>Demonstrate the proper care of stock locator records. Set up stock locations.</td>
<td>1. Operate a stock locator system.</td>
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<td>2. Know how to audit stock locator records.</td>
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<td>3. Review data card information.</td>
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<td>4. Develop a stock locator system.</td>
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<td>5. Know relocation procedures.</td>
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<td>6. Know when and how to consolidate storage items.</td>
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<td>7. Determine future available space.</td>
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<td><strong>Career Ready Practice:</strong></td>
<td>1, 3, 5, 10</td>
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<td><strong>CTE Anchor:</strong></td>
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<td>Technical Knowledge and Skills:</td>
<td>10.1, 10.2, 10.3</td>
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<td><strong>(6 hours)</strong></td>
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<td><strong>H. STORAGE OBJECTIVES: RECEIVING</strong></td>
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<td>Demonstrate all operations necessary for efficient receiving and processing. Simulate hazardous and security items.</td>
<td>1. Determine available space and labor.</td>
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<td>2. Be aware of correct storage for accessibility.</td>
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<td>3. Determine proper class of stock.</td>
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<td>4. Know supplies and equipment rotation.</td>
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<td>5. Know temperature control.</td>
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<td>6. Identify improper receiving storage practices.</td>
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<td><strong>Career Ready Practice:</strong></td>
<td>1, 3, 5, 12</td>
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<td><strong>CTE Anchor:</strong></td>
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<td>Communications:</td>
<td>2.1, 2.2, 2.3</td>
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(79-90-70) WeAreDACE.Org - 10 -
| (8 hours) | 7. Identify hazardous items.  
8. Identify security items. | Technology:  
4.1 Problem Solving and Critical Thinking:  
5.1, 5.2, 5.3, 5.4  
Health and Safety:  
6.1, 6.2, 6.5, 6.6, 6.7  
Responsibility and Flexibility:  
7.4  
Ethics and Legal Responsibilities:  
8.1  
Technical Knowledge and Skills:  
10.1, 10.2  
CTE Pathway:  
|---|---|---|
| I. CARE AND PRESERVATION OF SUPPLIES AND EQUIPMENT | 1. Identify proper storage of combustible items.  
2. Identify proper storage of textile goods.  
3. Identify possible temperature and humidity problems in storage.  
4. Identify combustible items.  
5. Know effect of corrosive influences.  
6. Know how to handle unsafe materials.  
7. Identify spontaneous combustion hazards. | Career Ready Practice:  
1, 3, 5, 6, 10, 12  
CTE Anchor:  
Communications:  
2.1, 2.2, 2.3  
Technology:  
4.1 Problem Solving and Critical Thinking:  
5.1, 5.2, 5.3, 5.4  
Health and Safety:  
6.1, 6.2, 6.3, 6.5, 6.6, 6.7  
Technical Knowledge and Skills:  
10.1, 10.2  
CTE Pathway:  
### J. SECURITY, HOUSEKEEPING, AND FIRE PREVENTION

Demonstrate the ability to work safely with hazardous materials. Demonstrate uses and purpose of fire equipment. Demonstrate good housekeeping procedures.

1. Describe the importance of adequate and proper housekeeping practices.
2. Integrate safety and good housekeeping practices into daily operation.
3. Prepare for weekly safety inspections of a warehouse.
4. Rehearse emergency procedures for hazardous material, fire operations, and fire extinguishers.
5. Recognize high risk and security items.
6. Prepare routine schedule for security check.

(Career Ready Practice: 1, 3, 6, 10)

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<tr>
<td>Communications: 2.1, 2.2, 2.3, 2.4</td>
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<td>Technology: 4.1</td>
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<tr>
<td>Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4</td>
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<td>Health and Safety: 6.2, 6.5, 6.6, 6.7</td>
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<td>Technical Knowledge and Skills: 10.1, 10.2</td>
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(12 hours)

### K. CONTROL AND METHOD ORDER-PROCESSING

Demonstrate methods for filling and processing invoices and orders. Know weights and measures. Identify terms and abbreviations.

1. Prepare control register.
2. Demonstrate progressive order filling.
3. Demonstrate simultaneous order filling.
4. Perform stock selection procedures.
5. Meet order deadlines.
6. Classify priority orders.
7. Write shipping orders.
8. Perform error free order processing.

(Career Ready Practice: 1, 3, 5, 8)

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<td>Health and Safety: 6.6, 6.7</td>
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<td>Responsibility and Flexibility: 7.4</td>
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<td>Technical Knowledge and Skills: 10.1, 10.2</td>
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(8 hours)
| L. BASIC PACKING PRINCIPLES AND REGULATIONS | 1. Apply packing terminology.  
2. Know disbursing units.  
3. Identify standard pack.  
4. Select appropriate packing material.  
5. Demonstrate how to prevent common types of damages.  
6. Identify standard shipping labels.  
7. Rehearse standard shipping procedures.  
8. Determine proper documentation.  
9. Develop check and balance shipping system.  
10. Know basic interstate shipping regulations. |
| (8 hours) | Career Ready Practice:  
1, 3, 5  
CTE Anchor:  
Communications:  
2.1, 2.2, 2.3, 2.4  
Problem Solving and Critical Thinking:  
5.1, 5.2, 5.4  
Health and Safety:  
6.1, 6.6, 6.7  
Technical Knowledge and Skills:  
10.1, 10.2  
CTE Pathway:  
A2.2, A2.3, A2.4, A2.5, A3.5, A6.1 |

| M. MATERIAL HANDLING EQUIPMENT | 1. Identify classification of Material Handling Equipment.  
2. Keep accurate maintenance records.  
3. Know uses and purposes for each piece of equipment.  
4. Understand charging procedures.  
5. Identify unsafe equipment.  
6. Identify malfunctions in equipment.  
7. Understand maintenance programs.  
8. Operate mobile equipment.  
10. Operate forklift (electric).  
11. Operate forklift (gas).  
12. Operate straddle-arm stacker.  
15. Operate order-picker.  
17. Operate stock tractor.  
18. Operate stock chaser.  
19. Operate pallet jack.  
20. Operate skid jack.  
21. Operate transporter (electric).  
22. Operate 2-wheel dollie.  
23. Operate 4-wheel dollie. |
| (50 hours) | Career Ready Practice:  
1, 3, 5, 9, 10  
CTE Anchor:  
Communications:  
2.1, 2.2, 2.3  
Problem Solving and Critical Thinking:  
5.1, 5.2, 5.4  
Health and Safety:  
6.2, 6.3, 6.4, 6.5, 6.6, 6.7  
Ethics and Legal Responsibilities:  
8.2  
Technical Knowledge and Skills:  
10.1, 10.2  
CTE Pathway:  
A2.3, A2.4, A2.5, A3.3, A5.1, A6.1, A6.3, A6.4, A6.5, A6.6, A7.2 |
N. OPERATION PROBLEMS

Solve warehouse and forklift operation problems.
Demonstrate manpower and equipment balance.

(4 hours)

1. Demonstrate ability to solve warehousing and forklift operation problems.
2. Demonstrate ability to use proper forklift terms in work contact.
3. Demonstrate ability to make warehousing decisions.

Career Ready Practice:
1, 3, 5, 10

CTE Anchor:
Communications: 2.2, 2.3
Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4
Health and Safety: 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 6.7
Ethics and Legal Responsibilities: 8.1, 8.2
Technical Knowledge and Skills: 10.1, 10.2

O. EVALUATION

Pass oral, written, and performance tests demonstrating all required skills.

1. Pass warehousing test with 100% accuracy.
2. Pass forklift test with 100% accuracy.
3. Pass industrial safety test with 100% accuracy.
4. Pass driving skills test by driving various industrial vehicles through obstacle course.

Career Ready Practice:
1, 2, 3, 5, 7

CTE Anchor:
Communications: 2.1, 2.4, 2.5
Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4
Health and Safety: 6.1, 6.2, 6.3, 6.4, 6.5, 6.7
Technical Knowledge and Skills: 10.1, 10.2
Demonstration and Application: 11.2
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<tr>
<td><strong>P. EMPLOYABILITY SKILLS</strong></td>
<td><strong>Career Ready Practice:</strong> 1, 2, 3, 5, 7, 9, 11</td>
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<tr>
<td>Understand the job market and prepare for seeking and maintaining employment.</td>
<td><strong>CTE Anchor:</strong> Communications: 2.1, 2.2, 2.4, 2.5, Career Planning and Management: 3.1, 3.2, 3.3, 3.4, 3.5, 3.7, 3.8, 3.9 Leadership and Teamwork: 9.4, 9.6 Demonstration and Application: 11.1, 11.2, 11.5</td>
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<td>(4 hours)</td>
<td><strong>CTE Pathway:</strong> A2.1, A2.6</td>
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1. Identify the various specialty areas for employment.
2. List sources for employment information.
3. Describe working conditions and pay scales.
4. Prepare cover letter and résumé.
5. Complete application forms.
6. Role-play basic interview skills.
7. Describe work habits required to hold a job.
SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES

TEXTBOOKS


RESOURCES

Employer Advisory Board members

Foundation Standards

Toyota Operator Program in Safety (T.O.P.S.) video.

Warehousing Education and Research Council (WERC) www.werc.org

OSHA Powered Industrial Truck Training Program

COMPETENCYCHECKLIST
TEACHING STRATEGIES and EVALUATION

METHODS AND PROCEDURES

A. Lecture and discussion
B. Demonstration
C. Field trips
D. Multimedia presentations
E. Practical on-the-job experience
F. Individualized instruction

EVALUATION

SECTION A – Orientation/Introduction – Pass all assignments and exams on orientation/introduction with a minimum score of 80% or higher.

SECTION B – Safety – Pass the safety test with 100% accuracy.

SECTION C – Principles of Modern Warehousing – Pass all assignments and exams on principles of modern warehousing with a minimum score of 80% or higher.

SECTION D – Principles of Space Layout – Pass all assignments and exams on principles of space layout with a minimum score of 80% or higher.

SECTION E – Identification of Storage Areas – Pass all assignments and exams on fundamentals of identification of storage areas with a minimum score of 80% or higher.

SECTION F – Processing and Preparing Receipts for Storage – Receive merchandise with a score of 100%.

SECTION G – Stock Locator System – Pass all assignments and exams on stock locator system with a minimum score of 80% or higher.

SECTION H – Storage Objectives: Receiving – Pass all assignments and exams on storage objectives receiving with a minimum score of 80% or higher.

SECTION I – Care and Preservation of Supplies and Equipment – Pass all assignments and exams on care and preservation of supplies and equipment with a minimum score of 80% or higher.

SECTION J – Security, Housekeeping, and Fire Prevention – Pass all assignments and exams on security, housekeeping, and fire prevention with a minimum score of 80% or higher.

SECTION K – Control and Method Order-Processing – Pass all assignments and exams on control and method order-processing with a minimum score of 80% or higher.
SECTION L – Basic Packing Principles and Regulations – Pass all assignments and exams on basic packing principles and regulations with a minimum score of 80% or higher.

SECTION M – Material Handling Equipment – Pass all assignments and exams on material handling equipment with a minimum score of 80% or higher.

SECTION N – Operation Problems – Pass all assignments and exams on operation problems with a minimum score of 80% or higher.

SECTION O – Evaluation – Pass all assignments and exams on evaluation with a minimum score of 80% or higher.

SECTION P – Employability Skills – Pass all assignments and exams on employability skills with a minimum score of 80% or higher.
Statement for Civil Rights

All educational and vocational opportunities are offered without regard to race, color, national origin, gender, or physical disability.