

Title of Lesson: **The Business Trip.**

Grade Level(s): **11-12th grade**

Materials Needed: **Computer with Internet access and a PDA
(supplied by the school)**

Lesson Overview: **Students will have the opportunity to research and plan a business trip to a foreign country utilizing the internet, design an itinerary and an expense log using the PDA provided. (using the "Palm One Tungsten" model)**

Learning Objectives: **This is a hands-on lesson for the student to demonstrate their knowledge in using the computer, internet and the PDA. Students will demonstrate their understanding and the importance in researching, preparation, planning, documenting and completing a business trip.
Estimated Time: 5 days (45 minute classes)**

Students will

- 1. Prepare a travel itinerary for a business trip to a foreign country; must include airfare, hotel information, car rental information and a calendar of events using the PDA to document information.**
- 2. Prepare and document an expense log using the PDA to document expenses; including airfare, hotel, car rental, meals, activities, etc.**
- 3. Schedule appointments using the PDA calendar**
- 4. Hot Sync and print all documents**

Procedures: **Each student previously received several weeks of classroom instruction using the PDA. Worksheets will be distributed to each student with specific instructions on the necessary information that must be included. Set up of documents is left up to the individual student, but the finished project must include: a Travel Itinerary, an Itemized Expense Log with a TOTAL, a calendar showing scheduled appointments, times and places (see attached worksheets).**

Method of Evaluation (if applicable, please include the answer key on a separate sheet of paper): **Completed project and documentation. See worksheets with listed rubrics.**

Options and variations of lesson (optional):
Use as a team project

Relevance to NBEA or NCTM Standards (see Educator Resources at www.oscpa.com):
***Business Education:* Students completing the assignment will learn to practice the Business Education standards. They will learn the importance of documenting, record keeping, and making financial decisions that affect not only themselves, but also the company with whom they are employed. Students will learn why a personal accounting system is important, what backup documentation is needed to cover business expenses and how to research various methods of travel using critical thinking skills. Students will obtain the use of technology similar to the real work place.**

Skills students will gain: **Time management and organizational skills, World-to-work experience, internet research, various uses of the PDA, understand how to Hot Sync and print required documentation.**

Please include, on a separate sheet, a short biography for yourself, as well as your credentials (resumes are acceptable). Contest entries should be sent via e-mail to awelch@oscpa.com or mailed in typed form to OSCPA, Attention: Amy Welch, 1900 NW Expressway, Ste. 910; Oklahoma City, OK, 73118. Questions can be directed to Amy at awelch@oscpa.com or by phone at 405/841-3800, ext. 3806 or toll free at 800/522-8261. All lessons become the property of OSCPA and cannot be returned

Students Name _____

Date: _____

***Introduce the
“Business Trip” Assignment***

COMPLETION DATE: 1 week.

Point Value: 200 points

INTRODUCTION: Your “boss” is sending you on a business trip to speak with various suppliers of materials needed for the Company. ** Designation: to be decided by you, but the location MUST be in a *foreign country*. You MUST visit *at least three suppliers* within *one business week*. You will begin by researching your travel arrangements using the Internet, create documents using your PDA and Hot Sync to your computer and print the necessary documents. You will be using the company credit card, so ALL expenses must be documented. Otherwise, it will come out of **your** pocket! (Points will be deducted if this happens).

REQUIRMENTS:

- Travel to a foreign country (Give the name of the country and city you plan to travel to on your Travel Itinerary (see below); *EX: London, England*) (10 pts) _____

Prior to your departure, you are to supply your “boss” with the following information:
(Use your PDA, set up documents, Hot Sync and print).

Travel Itinerary: (Print)

- Air Fare Information (Dates, Airline, Flight numbers, Departure/Arrival Times, Connections, and Best Price (35 pts) _____
- Hotel (at least a 4 star hotel) Give name of hotel, location, amenities, length of stay, and Price. (25 pts) _____
- Car rental (Economy class) Name of rental company, Price. Does this include mileage and gas? (15 pts) _____
- Calendar with scheduled appointments: List Contact/Company Name, dates, times and locations (25 pts) _____

While traveling, you are to keep record of the following expenses: (Set up expense report(s) using your PDA)

Itemized Business Expenses: (Print and attach to Final Business Expense Report)

- Meals (3 meals/day) *** You are required to accompany at least one vendor to dinner and pay for the meal (No alcoholic beverages). Give the date, list restaurant(s), amount spent (\$) and keep receipts! (25 pts) _____
- Activities/ entertainment (list specifics, include amount spent (\$)). Ex: Daily newspaper, attended concert, museum, etc. Must have at least 3 different expenses. (15 pts) _____

The “BOSS” is your teacher.

Students Name _____

Date: _____

Upon returning to the office, your "boss" expects your "Travel Expense Report" to be on his desk the next day. You are to attach your Itemized Business Expense Report. You are to (Make sure you have *sub totals* for each category and a *GRAND TOTAL* for the entire trip). Set Up this report using your PDA. This report must include: (Suggested example and format below) (50 Pts) _____

TOTAL EXPENSE REPORT

Employee Name: _____

Trip to: _____

Dates traveled _____

Categories: (include any changes in expenses)

Travel:

Airfare	\$ _____
Hotel	\$ _____
Transportation	\$ _____
	=====
Total:	\$ _____

Business Expenses

Meals	\$ _____
Activities/Entertainment	\$ _____
	=====
Total:	\$ _____
	=====

Grand Total \$ _____

The "BOSS" is your teacher.