

Professional Experience - BUSX 460

Learning Plan Handbook

Guidelines for a Successful Beginning

To Do Checklist:

One week before you report for your first day on the job:

- ✓ Carefully read the assignments in this handbook
- ✓ Make an appointment with Supervisor-Mentor three weeks prior to the beginning of class.



- ✓ Complete Learning Plan paper (see guidelines pg. 5)
- ✓ Complete Professional Experience Work-Learning Agreement Plan
- ✓ Complete Student's Self Assessment

Three weeks prior to the beginning of class, meet with your Supervisor-Mentor to:

- ✓ Discuss the requirements of the BUSX 460 course
 - ✓ Discuss the work expectations including your Learning Plan Objectives
- Bring:
- ▶ the Professional Experience Work-Learning Agreement Plan form,
 - ▶ the typed double-spaced discussion of your Learning Plan,
 - ▶ the Work Log form,
 - ▶ Mid Semester Evaluation,
 - ▶ Employer Evaluation,
 - ▶ List of KSAs
- ✓ Ask your Supervisor-Mentor to complete and sign the Work-Learning Agreement Plan
 - ▶ Clarify work hour requirement, 120 hours minimum, 120 hours maximum if unpaid. Your hours must be completed prior to the last day of the internship class.

At your first BUSX 460 class, have the following prepared:

- ✓ Learning Plan (typed, double-spaced)
- ✓ The Professional Experience Work-Learning Agreement Plan
- ✓ Student's KSA Self-Assessment
- ✓ Job Description
- ✓ Syllabus – available at http://www.towson.edu/cbe/intern_career/prof_exp.asp

COURSE OVERVIEW:

The senior-level experiential course provides you with the opportunity to apply the business Knowledge, Skills and Attitudes you have learned in the classroom to an internship, volunteerism or comparable experience. You will learn about the expectations of professional employment, gain access to expert knowledge, develop marketable skills, gain exposure to organizational culture and cultivate a network. The emphasis will be on your development of self-directed learning goals and personal reflection.

The class will meet in a seminar setting with a variety of topics that focus on career preparation and current issues of the workplace. The various work-related topics and assignments are designed to parallel your work experiences and to enhance what you learn on the job through your reflection, class discussions and guest speakers. In the seminars, you have the opportunity to place your work experience in the context of your major, share the experience with fellow students, and learn about their work experiences. **We will meet every other week during the Spring and Fall semester and every week during Summer session.**

Academic assignments include a reflection journal, learning plan, readings, résumé, and showcase portfolio. Grades are based on seminar participation, and performance evaluations, along with the assignments.

COURSE WEBSITE

Assignments, forms and other documents for BUSX 460 Professional Experience will be available at the BUSX Cornerstone/Professional Experience Program website:

http://www.towson.edu/cbe/intern_career/prof_exp.asp

MAKING THE MOST OF YOUR PROFESSIONAL EXPERIENCE:

The first days of the job will be very busy getting oriented to the work situation. Listening, observing and learning about your work responsibilities are your primary goals. In your position, you have access to people and information that may not be available to you at any other time in your career. Be prepared to learn from the people, activities and events in the work site.

Your sponsor expects you to be a responsible and thinking individual who adds value to the organization. In accepting this position, you have made a commitment to act as a professional: to be on time for work, dress appropriately, follow the organization's policies and procedures, communicate openly with your sponsor, and accomplish assigned tasks or projects according to the established deadline. Remember, YOU represent Towson University and the College of Business and Economics, and most important . . . yourself.

ASSIGNMENT INSTRUCTIONS FOR THE FIRST WEEK:

I. INITIAL INTERVIEW WITH YOUR SPONSOR/MENTOR: WORK EXPECTATIONS



Arrange a meeting three weeks prior to the beginning of classes with your sponsor/mentor, who may be different from the person who interviewed you, to review your responsibilities, discuss your learning objectives and set your work schedule. Be prepared for the meeting. Bring the typed double-spaced draft of your Learning Plan, the Work-Learning Agreement Plan form, the Work Log form, list of KSAs, Mid-Semester Evaluation and the Employer's Final Evaluation.

The purpose of the first interview in any organization is to establish your work responsibilities, your goals and the performance standards used for your evaluation. Use this meeting to also inform your sponsor of the other course requirements: participation in seminar sessions, periodic submission of a reflection journal, and other written assignments.

A. Use the Work-Learning Agreement Plan form as a basis to discuss the following items with your supervisor/mentor:



The Work-Learning Agreement Plan is a tool for you and your supervisor-mentor to use to develop a clear understanding about your duties and responsibilities, what you intend to learn during the professional experience, and the methods by which you will be evaluated.

1. Job Description

You should have a copy of the job description before you begin the Professional Experience. Review the description. Ask your supervisor how accurate the published description is. See if there are going to be any additional tasks or projects that are not mentioned in the description. Ask your supervisor to list the primary job duties on the Work-Learning Agreement Plan.

2. Performance Objectives

Establish the specific objectives that you are expected to accomplish over the course of your experience with your sponsor. These can range from routine, daily duties to specific training or education provided by the organization. A few questions to ask are:

- What is your expected work schedule? Keep a record of hours worked on the Work Hours Log. **For any internship or experience, the minimum number of work hours is 120. The maximum number of hours for an unpaid internship is also 120.** Your hours **MUST** be completed by the last day of your class.
- What are you expected to accomplish by the end of the internship?
- What are the rules, regulations, policies and procedures (employee parking, working hours, breaks, dress codes, security procedures, employee benefits, etc.)?

- What kind of training will be provided for you either overall or for your first assignment? If you did not receive any training, what information would you recommend be covered in training?
- Then, present your Learning Plan to discuss your learning objectives with your supervisor (refer to the Learning Plan guidelines pg. 5).

After coming to an agreement, ask your Sponsor-Mentor to complete, sign and date the Work-Learning Agreement Plan form. Then, you sign and date it.

3. Performance Evaluation

- Review with your supervisor the performance evaluation form required for this course: the Mid-semester Evaluation (available at http://www.towson.edu/cbe/intern_career/prof_exp.asp), which assesses your achievement of the KSA's, mid-semester. Provide your supervisor with the CBE final Performance Evaluation form which will be due on the 6th class session. Please provide the date as per the class section schedule. The final Employer Evaluation can be submitted by:
 - fax – fax number: 410-704-3664; or
 - Mail – Towson University, College of Business and Economics, Attn: Dean's Office, 8000 York Road, Towson, Maryland 21252
 - Email – wrodgers@towson.edu

Be sure that you discuss with the employer that evaluation should be based on your performance as a student and not in comparison to more experienced employees. (An excellent rating does not necessarily mean the student's performance is on par with a more experienced co-worker.) Familiarize yourself with **the Profile of a CBE Graduate** and be well versed in the eight areas of **KSA's**. Encourage your supervisor to use the KSA's as a basis for providing you feedback about your performance.

- Ask your supervisor if you will be evaluated according to the organization's performance standards. If so, request an explanation of the evaluation process and performance standards.
- Some essential aspects of your work performance (in addition to your knowledge and competencies that can affect your grading) include meeting the time commitments of the internship (duration, punctuality, attendance) and attitude. **Below average performance ratings that appear consistently throughout the employer evaluation will result in a failing grade for the course.**

II. LEARNING PLAN

A. **Overview:** The Learning Plan will enable you to focus on your learning in the professional experience. You



- Decide the knowledge, skills, attitudes, and values (objectives) you want to learn, develop or enhance during this professional experience.
- Develop a plan of learning objectives to include the strategies used to accomplish your objectives and the measurements used to evaluate achievement of your objectives.

B. Your Learning Plan:

The learning plan includes

- (1.) learning objectives (goals), NOT PERFORMANCE GOALS
 - (2.) specific strategies for accomplishing those goals and-HOW WILL I LEARN?
 - (3.) the methods of evaluating each goal accomplishment.-HOW WILL I SHOW A THIRD PARTY THAT I LEARNED SOMETHING.
 - (4.) KSAs to be evaluated for specific objective.
- Goals are normally broader statements, while strategies describe very specific activities, projects, and/or tasks.
 - What do you intend to learn through this experience? These are your learning objectives.
 - What will you do to accomplish the learning objectives? These are the strategies.
 - How will you know when you have accomplished your goal? These are the evaluation methods.

It is important that objectives, strategies, and evaluation methods be S-M-A-R-T

Specific Measurable Attainable Realistic Time-based

The details of the Learning Plan are developed and agreed to jointly by you and your supervisor/mentor. **It is integral to the success of your professional experience because it is the framework for your academic and work assignments from which you will learn.** This is your opportunity to declare what you want to learn, how you intend to pursue it, and how you'll know when you've done it.

1. **Your Learning Objectives** are concise statements that specify what you intend to learn AND accomplish for the internship organization during the course of the professional experience rather than what you expect to do;
2. Learning Objectives may be achieved outside the internship.

3. Learning Objectives are not simply a list of your activities in the position. **The objectives should indicate how you intend to add value for yourself, your employer, customers, or others who will benefit from your work experience.**

Examples:

- By May 2005, I would like to have learned all of the insurance products offered by my employer. (You could focus it to identify the specific types and what you want to know)
- By May 2005, I will enhance my knowledge and experience in performing professional presentations. (What aspect do you need to improve?)
 - Do you want to improve or develop skills, expand knowledge of a specific field, apply a particular body of knowledge?
 - What will you produce for the organization?
 - How will you contribute to the success of others as a member of your work team?

Set specific objectives: at least one must focus on the KSA's (knowledge, skills and attitudes) associated with personal or professional development or career exploration; and one can may focus on business results that you and your sponsor would like to achieve.

2. **Strategies.** Describe specific actions, processes, and work assignments that will allow you to achieve each objective.

I will learn _____ by reading trade journals (NAME THE SPECIFIC JOURNALS OR PUBLICATIONS) about the topic, writing a summary of the articles, and discuss those articles with my supervisor or a more experienced colleague.

I will seek opportunities to present company products to clients, create a script of talking points to help prepare, tape record my side of the conversation so I can assess my performance. I will ask my colleagues to review my performance by giving them a questionnaire.

SAYING THAT YOU WILL **OBSERVE YOUR SUPERVISOR** IS NOT ENOUGH OF A STRATEGY for learning; Saying you **will do a project** as is only part of a learning strategy. YOUR STRATEGY SHOULD BE SOMETHING THAT ADDS VALUE TO YOU AND YOUR EMPLOYER and you must be able to gain feedback from the specific strategy from your employer.

- You will read books, articles, and/or other materials that relate to your objective.
- You will do a general industry and company-specific analysis.
- You will interview professionals in the field and write a summary/reflection?
- You will do a project and develop criteria for review with your supervisor and then have the review.

3. Evaluation Methods. Describe how you will measure your progress toward the achievement of each of your learning objectives. What will you have to show a third party to prove you accomplished what you set out to learn.

- I will ask a supervisor to create a short test of information that I wanted to learn and take the test.
- I will videotape my presentation and ask a number of people to critique it using a set standard. (gain written evaluation)
- I will ask a supervisor for a written evaluation of my performance of a specific task.

How will you know, and show others that you have achieved your learning objectives?

How will you verify that what you did had the impact or succeeded to the extent you wanted?

How will you learn from the effort to enhance your work and career readiness?

- Will you compile records of your activities or the outcomes of your activities throughout the internship (e.g. reports on activities performed, summaries of statistics collected and analyzed, tests from training sessions, other people's comments on your approach to work and/or your achievement of agreed-to objectives)?
- The evaluation methods should include several of the following measures:
 - Quantity: how much, how many, what percent completed
 - Quality: how well you intend to meet the standards/specifications of the organization, or your supervisor's level of satisfaction with performance
 - Timeliness: deadline dates for completing assignments or objectives
 - Cost: estimated hours required, money or resources employed.
- The evaluation methods should indicate the **written documents** you will provide to demonstrate your achievement of the objectives.

What will NOT be a good evaluation statement?

- When I feel more comfortable..
- When my supervisor feels more comfortable
- When they let me do it on my own

C. Developing Your Learning Plan:

Start with the end in mind.

- What do you intend to learn from this experience?
- How you intend to add value for yourself, your employer, customers, or others?
- What are your career goals?
- What skills do you want to learn or enhance to add to your resume?
- What are your sponsor's expectations of you during this experience?

1. Complete a self-assessment using the KSA's Self-Assessment form.
 2. Use the completed KSA's Self-Assessment form to help identify the knowledge, skills, attitudes, and values you want to develop or enhance during this experience. Make a list.
 - What do you most want to explore, understand, or learn?
 - What would you like to change or be different by the end of this experience?
 3. Review the list and prioritize your objectives. Select **FIVE** that are most important to you to concentrate on during the semester. They should support your academic, professional, and /or personal concerns. Since the following KSA's are BUSX 460 objectives, you may not use any of these as a personal objective: Show evidence of a quality, mentored, reflective professional experience (KSA#18) and Demonstrate effective job search; career portfolio, resume and interview skills (KSA#19).
 4. Formulate each of your three learning objectives into a specific, concise statement. These goals should connect to your KSA Self-Assessment and be consistent on both your Learning Plan and your Work-Learning Plan Agreement with your supervisor.
 5. Outline how you plan to achieve each goal and how you will know when you have reached it. For each goal:
 - a. List the Objectives (action-oriented activities) using the SMART technique (specific, measurable, attainable, relevant, time-frame). Each objective should define what to do and when to do it. Identify the KSA associated with each objective. **DO NOT** simply copy the KSA – draft specific goal based on your individual situation.
 - b. List the strategies/activities in order and/or resources that will help you reach each goal.
 - c. Describe how you will measure and evaluate progress and the written documentation you will provide to indicate achievement of the objectives.
 6. Discuss your learning objectives with your supervisor/mentor during the Initial Interview.
 7. Submit your Learning Plan (typed, about two-to-four double-spaced pages according to the assignment format outlined below) after agreement with your supervisor. Attach the KSA's Self-Assessment, Work-Learning Agreement Plan along with your job description to your Learning Plan. Your learning plan can be modified during the course of the internship.
- D. Tips for writing your learning goals:**
Start with the stem: I will ... Add an action verb. State the outcome in terms that can be observed and measured.

For additional guidance, good examples of a Learning Plan and Work-Learning Plan Agreement from a previous BUSX 460 student are included at the end of this Handbook along with the Student's Self-Assessment. All three items plus your job description are to be submitted as a package to the BUSX 460 office on the first day of classes. All names for the student and supervisor have been blacked out to maintain anonymity. **PLEASE NOTE THAT YOUR LEARNING**

PLAN MUST BE DOUBLE-SPACED AND HAVE THREE (3) LEARNING OBJECTIVES. AT LEAST ONE LEARNING OBJECTIVE NEEDS TO BE RELATED TO A KSA ASSOCIATED WITH PERSONAL OR PROFESSIONAL DEVELOPMENT.

E. Assignment Format:

All assignments must reflect a professional quality. All reports are to be well organized, professionally written and typed using a word processor. They should be easy to understand without having to refer back to the assignment sheet. Conciseness of thought and organizational appearance are important in business and, therefore, important for grading purposes in this class. Inattention to correct spelling, grammar, punctuation, and sentence structure will result in a reduced grade. **More than ten (10) spelling, grammar, punctuation or sentence structure mistakes will result in a zero for the assignment.** Make a copy of all assignments for your records

Assignments must be completed when due. Completing an assignment on time is required at the workplace and in this course. **A late assignment will result in a reduced grade of 0%.**

Format:

- Typed in 12 Times New Roman font and double-spaced with 1 inch margins.
- Double space before subject headings. First level is all caps, bold face. Second level is upper and lower case, bold face, underlined at left margin. Example: **PRIMARY HEADING** and **Secondary Heading.**
- Double space between paragraphs.
- Include page numbers on all assignments (except your portfolio).
- Staple together and include a cover page. All of your papers (including journals) must include your name, your internship job title or project title, your organization, your section number and instructor name in addition to the date and assignment title.



EGTRRA 2010
Subject Matter Expert
T. Rowe Price
May 26, 2009

Learning Plan
Work-Learning Agreement Plan
Student Self Assessment
Job Description

During my current employment as a Retirement Client Service Associate, I have become a member of the Qualified Plans Team. By taking on the project of EGTRRA (Economic Growth and Tax Relief Reconciliation Act of 2001) Subject Matter Expert, I will have the opportunity to expand my knowledge of Qualified retirement plans and enhance my leadership skills. The additional responsibilities and tasks involved in this project will make me more of a resource to my department and make me more marketable within T. Rowe Price.

OBJECTIVE #1

During this project, I will learn to effectively lead training classes and improve my oral presentation skills in a classroom environment.

Strategy

Several months ago I attended a training course called Trainer's Workshop. I will refer back to the information presented in this workshop by reviewing and studying my training materials. I will also work directly with the department which develops our training materials. I will review my Instructor Guide prior to teaching any classes and ask for clarification if anything is unclear.

Evaluation

While facilitating training classes I will check to make sure that the class participants are following along and make sure that they are clear on all of the course objectives and concepts. After each objective that I teach, I will ask students to explain and review what we have covered. I will also provide a course evaluation questionnaire which will solicit feedback from each person who attends the course.

OBJECTIVE #2

Throughout this project, I will develop my technological skills and learn to present project status to my supervisor using spreadsheets and graphs.

Strategy

I will meet with my supervisors to determine exactly what type of information they would like in my reports and the format that they would like to see. I will complete a T. Rowe Price designed Web Based Training to improve my skills with advanced Microsoft Excel topics. Finally, I will use the help features within Microsoft Excel if I am unfamiliar with any of the functions that my supervisors would like me to use in the spreadsheets.

Evaluation

Once I have completed the first report to my supervisors, I will ask for written feedback on the information provided and the format of the information. I will be able to take this feedback to make changes and improve the effectiveness of the report. My supervisor will be able to confirm that I have completed this objective by accepting my reports without requesting that the information be altered.

OBJECTIVE #3

During this project, I will learn to accurately process and update our back office recordkeeping systems to track retirement plans' completion of the EGTRRA restatement and any changes to plan provisions made during the restatement

Strategy

I will learn how to use new features of our processing systems by attending training classes lead by specialists from our processing group. In these training classes, we will learn to use the software and receive hands on experience in a training environment. Once I have completed the training course, the processing specialists will determine if I know the systems and procedures well enough to begin processing using real accounts and paperwork. I will use quality checklists to ensure my accuracy while processing.

Evaluation

After I finish processing and updating each account, my work will be sent to a quality department to verify the accuracy of the updates. I will receive verbal feedback if all of my work is completed accurately and I will be

required to fix any mistakes that I make. The quality and accuracy of my work will be reviewed using a rating system and presented to me in writing.

OBJECTIVE #4

By the end of this project, I will learn to efficiently manage project deadlines and effectively delegate duties to team members.

Strategy

In order to learn about time management and delegating duties, I will assist another specialist in a project very similar to the project that I will be leading. I will make decisions in this project and solicit feedback about how well I delegated responsibilities. I will learn how to complete the project within its deadline by making time estimates using data from previous projects.

Evaluation

This objective will be accomplished once I have successfully completed a mailing project. I will be able to show that I have delegated duties to associates who are the most qualified to perform them. Ultimately, I will show that I have completed this objective by presenting the mailing project to my supervisor prior to the deadline.

OBJECTIVE #5

During this project, I will learn to clearly convey concepts and relevant project updates to all groups who will be impacted by EGTRRA.

Strategy

By working with other specialists within my department and our training groups, I will learn the best way to clearly convey project updates. I will prepare updates to the manuals that all associates within my department use as a resource. Once the information is complete, all other departments who rely on the information will be able to access it through the company intranet.

Evaluation

Once the information is complete, I will have our department's legal contact critique the information to ensure that everything is correct. I will also solicit feedback from our training department to make sure that the ideas are presented correctly. I will know that this objective is complete if associates are able to read and understand my updates without needing additional clarification.

CONCLUSION

By following this learning plan throughout this semester, I will be able to develop several of the KSAs that are important to both T. Rowe Price and Towson University. These are also goals that will make me more marketable within the company. I feel that once I have completed this project, I will be able to enhance my resume and I will be more prepared for potential promotions in the future.

Student's Self- Assessment (KSA): BUSX 460

Student: _____

Date: _____

Final: _____

Each CBE graduate is expected to perform successfully in the following eight areas of Knowledge, Skills and Attitudes. Please rate yourself on the KSAs. Use a checkmark for the initial self-assessment and a "X" for the final.

Rating Scale is: 5 = EXCELLENT; 4 = VERY GOOD; 3 = SATISFACTORY; 2 = FAIR; 1 = POOR; N/A = Not Applicable

ACCREDITED BUSINESS KNOWLEDGE	5	4	3	2	1	N/A
1. Know, apply, and integrate the content of one's major	✓X					
COMMUNICATION	5	4	3	2	1	N/A
2. Write articulate, persuasive, and influential reports, proposals, letters	X	✓				
3. Make articulate, persuasive, and influential oral presentations	X	✓				
4. Develop graphic, spreadsheet, and financial analysis to support position taken		X	✓			
5. Engage in active listening in individual and group settings		✓X				
THINKING: CRITICAL and CREATIVE	5	4	3	2	1	N/A
6. Identify problems and/or opportunities using cross disciplinary concepts.	✓X					
7. Generate and evaluate feasible alternatives		X	✓			
8. Develop comprehensive, justified conclusions and recommendations using qualitative and/or quantitative tools		X	✓			
TECHNOLOGY	5	4	3	2	1	N/A
9. Use general and discipline specific software for state-of-the-practice business applications.		X	✓			
LEADERSHIP and TEAMWORK	5	4	3	2	1	N/A
10. Focus on goal achievement			✓X			
11. Guide team towards the achievement of common goals.		X				✓
12. Maintain group cohesion, follower satisfaction, and efficient operations		X				✓
ETHICS and VALUES	5	4	3	2	1	N/A
13. Display ethical conduct and honor system behavior	✓X					
14. Apply ethics in business decision-making, considering impact on multiple stakeholders	✓X					
ATTITUDE and PRACTICAL EXCELLENCE	5	4	3	2	1	N/A
15. Be attentive, proactive and ready to learn	X	✓				
16. Meet commitments and complete tasks according to assigned requirements		✓X				
17. Treat others with respect, show sensitivity to their views, values and customs	X	✓				
EMPLOYABILITY	5	4	3	2	1	N/A
18. Show evidence of a quality, mentored, reflective professional experience		X				✓
19. Demonstrate effective job search; career portfolio, resume and interview skills		X				✓
20. Assume responsibilities for one's own career management and goal setting		X	✓			
Total Score (completed by course instructor)						

Total columns:

INITIAL SELF-ASSESSMENT

of 5's 4 X 5 = 20

of 4's 6 X 4 = 24

of 3's 6 X 3 = 18

of 2's _____ X 2 = _____

of 1's _____ X 1 = _____

FINAL SELF-ASSESSMENT

of 5's 8 X 5 = 40

of 4's 11 X 4 = 44

of 3's 1 X 3 = 3

of 2's _____ X 2 = _____

of 1's _____ X 1 = _____

TOTAL SCORE: 62

87