

# Organization Research



= Student Task

= Supervisor and Student



**Objective: Get to know the basics about your organization and supervisor.**

Task 1: Fill out the form located in this section.



Task 2: Look over your organization's handbook.



Task 3: Most companies have an Organizational structure. Ask for a copy of this structure if the company.



Task 4: Go over the Organizational Chart and see if you can get introduced to anyone in those areas



Task 5: Sit with student to Help them fill out form



Task 6: Provide student with Employee and Company Handbook



Task 7: Student will be looking at company Organizational chart



Task 8: Meet with student to wrap up month and help set goals



Task 1: Fill out below form- Meeting with Supervisor

- The goal is to lay the foundation for an important information you will need during your internship
- Help you get to know your supervisor and connect with them

Task 2: Look over your organization's handbook.

- Make sure you are given a copy you can write in. Highlight 5 things that interest you from handbook
- Be ready to discuss these 5 things at the end of the month with your supervisor

Task 3: Organizational chart

- Most companies have an Organizational structure. Ask for a copy of this structure if the company has a copy
- Look and highlight who you want to meet- Be realistic with this expectation. Most Presidents and CEO's of companies may not be available
- Look for people in departments that may interest you when it comes to a picking a career (marketing, finance, design, customer service)

Task 4: Meet with a supervisor

- Go over the Organizational Chart and see if you can get introduced to anyone in those areas
- Set your expectations for the internship
  - o What do you want to learn on this internship?
  - o What departments do you want to meet with to help you learn about different careers?

## Meeting with your Supervisor Worksheet – Task 1

Fill in the basic data below in your meeting with your supervisor.

Your Name: \_\_\_\_\_

Date of Meeting: \_\_\_\_\_

Your Direct Supervisor's Name: \_\_\_\_\_

Meet with your Supervisor about the appropriate channels of communication by asking the questions listed in the boxes to the left. Take detailed notes of their responses in the space provided to the right.

### **I want to be respectful of your time..."**

How often would you like me to check-in with you?	
How can I determine if you are available or busy?	
Would you prefer scheduled check-in's, or should I stop by/email you?	
If you are not available, who else can I contact? (Name, email address, where they sit)	
Who should I contact if my work schedule changes? (i.e. – Sick, Time-off, running late)	

# Communication Skills



= Student Task

= Supervisor and Student



**Objective: Improve and develop communication skills for success in the workplace.**

Task 1: Read an article about proper business introductions (see appendix B-1) and introduce yourself to your co-workers. If you've already met, re-introduce yourself.



Task 2: Read the "Communication and Workplace Etiquette" information included in appendix B-2. Pick one skill from the list. In 5 sentences or less, write a short story/scenario where someone used this skill to stand out in the workplace. The story can be true or fiction, and the individual could stand out in a positive way, or a negative way.



Task 3: Complete the self improvement plan in appendix B-3. Identify your areas of strength, and where you need improvement.



Task 4: Watch a short video of a former CRJ student (appendix B-4). Write down three strong communication skills the speaker displays. Give examples of how he used these skills during his presentation.



Task 5: (Optional): Create a "mock" introduction scenario with the intern. Ask the intern to introduce themselves to you in person and in email.



Task 6: (Optional): Meet with the intern to discuss how communication skills can affect people in the workplace. Give an example where strong skills added to the success of an employee, and an example where a lack of skills hindered an employee's success.



Task 7: (Optional): Tell the student a specific communication skill that you find difficult and give an example of how you work to improve that particular skill.



Task 8: (Optional): Have a "wrap-up" meeting. Discuss the importance of communication skills in a business environment. Ask the student to their top two take-aways from their communication training and tasks.



# Task 1: Proper way to introduce yourself



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- Turn to Appendix B-1
- Read the article “The Do’s and Don’ts of Business Introductions and Greeting Etiquette” by Diane Domeyer.
- Now let’s put what you have read into action! Ask your supervisor if you can walk around the office area and introduce yourself to co-workers. If you have already been introduced to a co-worker, acknowledge the previous introduction and re-introduce yourself.

## The Do's and Don'ts of Business Introductions and Greeting Etiquette

**H** [homebusinessmag.com/lifestyles/self-improvement/dos-donts-business-introductions-greeting-etiquette](http://homebusinessmag.com/lifestyles/self-improvement/dos-donts-business-introductions-greeting-etiquette)

Diane Domeyer  
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Making a good first impression is vital to any entrepreneur, but working from home can leave your business greetings a little rusty. Do you have trouble knowing whether your professional salutations are up to par? If not, it's time for a refresher course. Heed these do's and don'ts to make sure you're memorable

for all the right reasons when making business introductions.

**Don't greet everyone with a hug.** It's true that Americans are huggers: According to research from The Creative Group, more than half (54 percent) of U.S. executives surveyed said hugging colleagues is at least somewhat common, up from 30 percent five years ago. When you work from home, you may be overjoyed to see business contacts in the flesh, but hugs should be reserved for those you are certain would like to receive them.

**Do greet clients with a firm handshake.** Clients are a whole different ball game when it comes to hugs. More than three-quarters (77 percent) of executives said business embraces are rarely, if ever, appropriate when greeting these individuals. When meeting clients, handshakes are definitely the gold standard.

**Don't send unsolicited texts to business contacts.** It's fine if you've established that your manager is open to receiving texts from you, say, when you're going to be out sick for the day. But texting professional contacts is generally considered quite informal and not recommended. It's better to stick to traditional modes of communication, like phone calls and email.

**Do keep your voice messages and greetings short and sweet.** When you're leaving a voicemail message, appreciate that the other person's time is valuable. Keep your business greetings in voicemail to the basics: Your name, the purpose of your call and how to reach you. Likewise, your outgoing voicemail message should be personalized but succinct.

**Don't stray away from Ms.** In the past, using Mrs. Smith for a married woman or Miss Smith for a single woman was the standard in business introductions. But unless you have a personal relationship with the person, it's better not to make assumptions about marital status. It's much safer to use the standard Ms. for all women in formal business greetings.

**Do be aware of cultural differences.** In creative industries in the United States, immediately going to a first-name basis when conducting business introductions is quite common. When working with professional contacts from other countries, it's more respectful to use formal titles with last names until advised otherwise.

**Don't assume everyone knows everyone.** When joining coworkers or clients in person or on a conference call, make a point to introduce everyone. The traditional etiquette of business greetings states you should name the most

important people first – often your clients or the highest-ranking individuals in your organization.

**Do have an elevator pitch prepared.** When introducing yourself, have a one-sentence elevator pitch at the ready so you don't hesitate when someone asks, "What do you do?" Practice it in front of a mirror or with a friend to work out the kinks. Here are some great examples:

- "I run a marketing agency that supports mid-sized businesses in the Bay Area."
- "I'm a financial planner, mainly focusing on estate planning and money management for individuals."
- "I'm a communications professional specializing in content marketing and social media in the tech industry."

**Don't draw a blank.** Repeating names when meeting people for the first time ("It's nice to meet you, Jane ...") enables you to quickly establish rapport and commit their names to memory.

**Do mention specifics about why you're introducing two contacts.** In person or in an email, be sure to note what the two individuals you're introducing have in common or what they are likely to talk about. Did they attend the same school? Perhaps they work in the same field or live in the same neighborhood. Or maybe their experience dovetails perfectly for a planned project.

**Don't forget to use spell-check on your business introductions.** Just because email can feel less formal than an in-person introduction doesn't mean you should cut corners or rush when writing. Always double-check your spelling – especially of the names of the people you're emailing – before shooting off business introductions via email.

You only get one chance to make a first impression, so make the most of it. Thoughtful business introductions are sure to pay dividends for you as well as for the people you connect.



## Task 2: Communication is key



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- Go to Appendix B-2
- Read the fundamentals of Communication & Workplace Etiquette
- Pick one skill from the list.
- In 5 sentences or less, write a short story/scenario where someone used this skill to stand out in the workplace. The story can be true or fiction, and the individual could stand out in a positive way, or a negative way.

# Communication & Workplace Etiquette

## Fundamentals

Effective communication skills are very important in the workplace. It is important to consider all forms of communication, including verbal, non-verbal, and written.

Mastering these skills will help you gain an edge in life itself and set you apart from others in the office.

- Respect: At the core of effective communication and etiquette is a fundamental respect for other people.
- First impressions are important
  - Be on time
  - Introduce yourself with a handshake
  - Take note of the person's name
- Maintain a clean and professional appearance
- Non-verbal communication is essential
  - Maintain good posture
  - Face the speaker
  - Maintain eye contact
  - Smile
- Give sincere compliments and say "Thank you" when a compliment is given
- Express a genuine interest in others
  - Show concern
  - Ask questions
  - Make a connection
- Display a positive attitude
  - Avoid criticizing others publicly. Any grievances should be communicated privately to the appropriate person.
  - Show that you are willing and eager to accept new tasks
- Be an active listener
  - Focus your attention to the speaker
  - Maintain good eye contact and body language (such as head nods)
  - Don't interrupt
  - Always take detailed notes, and save them in a safe location so you can easily refer back to them
- Follow all instructions
  - Always restate instructions in your own words to show that you understand and prevent misunderstanding
- Respectfully accept feedback from others
- Accept your mistakes and apologize sincerely

## Task 3: Self Improvement Plan Assessment



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- Go to Appendix B-3
- Complete the Self Improvement Plan Assessment
- Determine which behaviors are your strengths and which need improvement.
- Put together a plan on how you can work on the items you X'd need improvement
  - Ex: I need to work on being punctual. How I will do this is I will start to set alarms or set calendar reminders.

# Self-Improvement Survey

Go through the following survey and determine your strengths and areas that need improvement. Consider ideas on how you can improve.

Put a X in the box that think best describes you:

Strength	Needs Improvement	
		Use appropriate greetings
		Introduce others.
		Introduce yourself.
		A winning handshake.
		Make others feel welcome.
		Express appreciation.
		Give compliments.
		Receive compliments.
		A positive attitude.
		Handle inappropriate behavior from others.
		Join conversations without disrupting.
		Contribute to conversations.
		Use open questions when appropriate.
		Show an interest in others.
		Have an open posture.
		Maintain eye contact.
		Punctual for appointments.
		Trustworthy with deadlines.
		Sensitive when criticizing another person.
		Avoid aggressive behavior.
		Manage conflict.
		Identify problems.
		Own problems.
		Apologize when necessary.
		Accept apologies graciously.
		Table manners.
		Use polite words like please, thank you and you're welcome
		Have a warm telephone manner.
		Treat everyone with respect.

## Task 4: Communication skills



- Go to Appendix B-4
- Watch the short video we provided and identify the strong communication skills that the speaker displays.
- After you have completed the video, meet with supervisor to go over your calendar and your ways to improve

INSERT CRJ STUDENT VIDEO

<https://www.youtube.com/watch?v=dfWhWyAoUMY>

# Computer Skills



= Student Task

= Supervisor and Student



**Objective: Become familiar with how to use the Microsoft Office Suite on the job in a professional setting.**

Task 1: Learn how to use Outlook Email



Task 2: Learn how to use Microsoft Word



Task 3: Learn how to use excel spreadsheets



Task 4: Create slideshows in PowerPoint



Task 5: Sit down with student to show them skills in outlook



Task 6: Invite student sit in on meeting to take notes



Task 7: Show student some commonly used functions in excel



Task 8: Meet with student to view the PowerPoint they created



\*Microsoft Office tutorials and instructions can be found here: <https://support.office.com/en-us/office-training-center> \*

#### Task 1:

- Add a standard email signature to your messages.
  - o Ask your supervisor if the company requires a template signature and use it if they do
  - o If not, it is customary to include the following in your professional signature line: Name, Title, Company Name, Phone Number and Email Address
  - o Include a standard signature on your email replies as well. It should be shorter and generally indicates your Name and Phone Number
- Create calendar appointments
- Create contacts for everyone you meet on your job
- Ask to coordinate a meeting for your supervisor or coworker
  - o Send out a calendar invite
  - o Attach an agenda to the invite
  - o Track responses
  - o Schedule a reminder for attendees
- Express gratitude: Have you written a thank you email to someone who has helped you at your job recently? Take time to say thanks.

#### Task 2:

- Set an appointment with your supervisor and create an agenda of topics to discuss. The topics will be the skills of Microsoft Word you'd like to learn from this meeting. Some examples are:
  - o How to title and save a document
  - o How to make bullet points and outlines.
  - o How to print a document and print it in color.
  - o Think of other things you need to do for papers at school. Ask how you can do these in Word.
- Ask Supervisor if you can sit in on a meeting and take notes of what is discussed using Word.

#### Task 3: Learning topic is Excel

- Create a spreadsheet to list all your job responsibilities and accomplishments. Update the spreadsheet as you progress through the year.
- Ask your supervisor for an assignment that helps to build skills in excel: inventory the supply cabinet room, track open initiatives, document a project budget

#### Task 4: Learning topic is PowerPoint

- Create a PowerPoint deck with 8-12 slides.
  - o Topic can be something you are passionate about and want to share with your supervisor
    - Review other PowerPoints for ideas and formats to consider
    - Include at least one animation in your deck
    - Embed a video in the deck
    - Use bullets rather than paragraphs
    - Use images to convey your points
- Schedule time with your supervisor and/or co-workers to give your presentation. Ask for feedback and be open to both positive and constructive comments



# Time and Task Management



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= Supervisor and Student



**Objective: Improve time and task management skills.**

Task 1: Organize your workspace and ask for a notebook or planner



Task 2: Schedule time for breaks and daily tasks in Microsoft outlook



Task 3: Break bigger tasks into smaller ones



Task 4: Track the time it takes to do your tasks



Task 5: Supply student with notebook or planner



Task 6: Meet with student to show them how to organize their calendar



Task 7: Assign project to student to work on and help organize deliverables and deadlines



Task 8: Follow-up with student on how much time it's taking to complete tasks



Task 1:

- Ask supervisor if there is a company used notebook or daily planner that you can use for your internship
- When meeting with supervisor, be proactive and ask what types of daily tasks you will be doing and if there are deadlines for them
- Start each morning by writing down what you want to accomplish that day
- When you accomplish a task, go to your notebook/planner and cross that off your list
- Organize your workspace so that everything has its own place and is easy to access when needed

Task 2:

- Use your outlook calendar to start scheduling blocks of time for your tasks and breaks – sometimes using different colors for different things helps
  - o In outlook calendar, select the block of time and hit New Appointment. In the Tags column, there is a Categorize section, add a Category and assign it a color for various tasks or breaks.
- Use outlook to schedule a meeting with your supervisor to go over outlook calendar best practices
  - o Ask them to share how they use their calendar to organize their day
  - o Show them ideas of how you were thinking of organizing yours
- Make sure to schedule quick 15-minute breaks and be specific about what you'll do – maybe it's walk around the floor to get your body moving, or going to get a water or coffee

Task 3:

- If you have a bigger task that might take some time, break it up into smaller deliverables to help plan out a timeline of when it will be complete
- Ask your supervisor if he/she has any specific timelines or deadlines for the project for you to work on
- Schedule out and prioritize the smaller tasks to make sure the project gets done on time

Task 4:

- Since you've been using your outlook calendar to help organize your day, check in to see if the time blocks, you're allotting are too short or too long
  - o If you haven't been able to fit in all your tasks, are you taking too many breaks?
- If you've finished all your tasks, schedule time on the calendar for homework blocks
- Plan out future tasks on your calendar if you've finished your daily tasks, start on the future ones to get ahead
- Check in with supervisor to ensure you're accomplishing everything you need to in a timely manner

# Build Your Brand- Social Media



= Student Task

= Supervisor and Student



**Objective: To evaluate if your social media platform is harmful or helpful.**

Task 1: Take a deeper look into your social media pages



Task 2: Pick someone you follow on social media and use worksheet below



Task 3: Create a LinkedIn profile



Task 4: Meet with supervisor to go over findings



Task 5: Meet with student to talk about professional social media policy



Task 6: Share some of your favorite professional social media profiles



Task 7: Connect with your student on LinkedIn



Task 8: Meet with students to review social media findings



#### Task 1:

- Take a deep dive look into your social media accounts- Facebook, Instagram, Twitter, Snapchat, Google your name
  - o Things you are looking for- pictures you are tagged in, thoughts you have shared of others or that you yourself have posted
  - o What kind of content do you see yourself usually posting about- is there a pattern of things you post? (Example is it pictures with friends/ family, memes, song lyrics)
  - o In that content you post- is everything is the post appropriate (cuss words, suggestive language)
  - o Check your privacy settings to see what people can see – you can control your presence on social media

#### Task 2:

- Pick one of your favorite athletes, celebrities, a role model or company that you follow on Social Media
  - o What kind of content do you see them posting- can you find things that might seem offensive to others, are their post relatable?
- Read the following articles about how social media has had an effect companies and student athletes
  - o <https://sysomos.com/2016/12/05/athletes-got-trouble-social-media/>
  - o <https://www.staradvertiser.com/2018/07/29/sports/sports-breaking/old-tweets-by-athletes-highlight-teams-fears-of-social-media/>
  - o <https://money.cnn.com/2018/03/16/technology/snapchat-stock-rihanna/index.html>

#### Task 3:

- Create a Linked in account- Use attached template, check in with a supervisor to see what suggestions they have

#### Task 4:

- Sit with your supervisor and ask if they would share their social media information with you (if they are comfortable),
  - o Ask them questions about what they post and why they post?
  - o What are their thoughts on social media and how it affects, or has it affected their career?
  - o Does their company have policies about social media use? How does it affect how you can use social media?
  - o Go over the information you read in the articles to get thoughts

# Leadership Skills



= Student Task

= Supervisor and Student



**Objective: Become a good leader inside and outside the workplace.**

Task 1: Research a leader from this century and complete worksheet below



Task 2: Read 5 ways to be a better leader



Task 3: Learn how to handle conflict confidentially



Task 4: Fill out leadership goal worksheet



Task 5: Meet with student to learn about the leader they selected



Task 6: Meet with student to discuss article on ways to become a better leader



Task 7: Meet with student to discuss conflict resolution



Task 8: Meet with student to discuss results of their leader worksheet



Task 1:

- Think of a great leader from the last century. This leader may be a leader in government, business, entertainment, philanthropy, or sports. Research the leader to get some of the answers below:
  - o What traits of leadership did/ does your leader demonstrate during his/her life?
  - o What examples from your leader's life demonstrate each trait listed above?
  - o How did each leadership trait affect the leader's ability to have an impact?
  - o What leadership traits do you share with your leader?

Task 2:

- Read the article below on 5 Ways to Be a Better Leader -  
<https://www.lollydaskal.com/leadership/5-ways-to-be-a-better-leader/>
  - o Schedule a meeting with your supervisor and talk about how they achieve these 5 topics in their work place
  - o Also talk about the good and bad traits you listed from week one and the importance of those with your supervisor- see what they look for in a leader when hiring

Task 3:

- Learning the how to handle conflict
  - o Read about these 5 stages of conflict resolution- which one to do identify with more -  
<https://theparticipationcompany.com/2016/06/5-conflict-resolution-strategies/>
  - o Think of a time you have an issue with a friend, classmate, supervisor, or coworker, which of the 5 stages did you use with the issue? After reading the article could you have handled it better? Explain and write down how? Write down the steps to have better handled the situation
  - o Take the self-test on how you handle conflict. Calculate your score, where do you land? What do you need to work on?

Task 4

- Fill out the Leader in Me worksheet. Meet with your supervisor to go over your results and set a goal become a better leader.

### Task 3- Worksheet



## When I Have a Conflict



You may have heard teachers or other kids talk about conflict resolution. This is another term for solving or resolving conflicts. When it comes to conflict resolution, where do you stand right now? What are you doing to be a conflict solver? Take this quick self-test to find out. Respond yes or no to each statement:

### When I have a conflict ...

- ☐ I try to calm down before I react.
- ☐ I do my best to avoid physical fighting.
- ☐ I believe I have more to gain by working things out.
- ☐ I listen to what the other person has to say.
- ☐ I try to see how I'm responsible instead of just blaming the other person.
- ☐ I look for ways to solve the problem rather than win the argument.
- ☐ I'm willing to compromise.
- ☐ I avoid using put-downs.
- ☐ I speak my truth, but I do it respectfully.
- ☐ I try to put myself in the other person's place instead of only focusing on my own stuff.



### How many times did you answer yes?

**Five or more?** If so, you're already a conflict solver a good part of the time. Keep at it! Also know that you'll become an even better conflict solver by working to turn your "no" answers into "yeses."

**Fewer than five?** You're not there yet . . . but you can get there. Choose one new idea to try and do it until it starts to come more easily. Then choose another. Also continue doing whatever you said yes to.

**If you answered yes to the third statement,** you've already made an important start. As you read earlier, being willing to work out conflicts is the first big step on the road to becoming a conflict solver.

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## Task 4- Worksheet

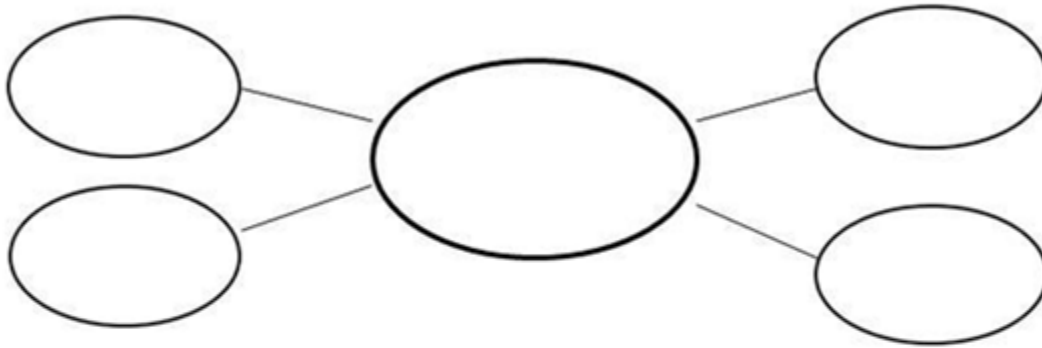


# THE LEADER in **ME**

HABIT TWO: BEGIN WITH THE END IN MIND  
"Have a Plan"

## MAKE A MISSION STATEMENT

Part One: Write your name in the circle. Out from the circle, write words that describe you.



Part Two: Now think about what kind of person you WANT to be. Make a list.

I want to be a:

**Example:**

I want to be a:

Hard worker

Good student

Kind person

Talented artist

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Part Three: Use the two lists to write a mission statement. This is a sentence or paragraph about the person you want to be.

**Example:**

My mission is to:

Laugh a lot

Learn as much I can

Work hard at home, school and in my sports

Be kind to others

Take good care of myself

To get better at my art.

**MY MISSION IS TO:**

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# Resume Building & Interviews



= Student Task

= Supervisor and Student



**Objective: Create a resume that can be used for future job and college applications.**

Task 1: Choose a resume template and establish an objective



Task 2: Detail your educational and professional experiences



Task 3: Research company and jobs



Task 4: Ask your supervisor to interview you



Task 5: Share your resume with the student



Task 6: Talk to student about references



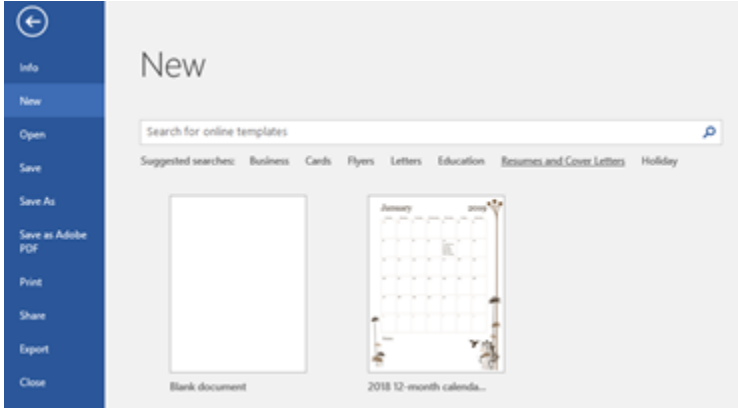
Task 7: Share interview experiences with student



Task 8: Interview student for a pretend position and give feedback



## Task 1.

- Browse resumé templates
    - o Microsoft Word has many of pre-loaded resumé templates to consider.
      - Within the top-left File menu in Word, click “New”. The screen will have a search bar and Suggest Searches (screenshot below)
- 
- There are many potential templates available via a Google search as well.
- o Pick a template has space for all of your related information
    - Contact information, objective, education, work experience, and skills are the most important areas of information
    - Remember to keep it simple: trying to be too colorful and fancy won't work with every employer. The important part is showcasing your background and skills.
  - o Remember that you can change templates over time
    - Trial and error – your first pick of template might not be best fit. Be prepared to try multiple options
- Establish an Objective
    - o Your Objective is a summary of who you are and the goal you want to accomplish with your resumé
    - o Keep it strong and confident. One to two sentences
    - o It can be specific each company you are applying to or more general if applying to many different jobs
    - o Keep trying – this is often the most difficult thing to articulate
    - o Examples
      - “Recent college graduate looking to utilize my internship experience at Under Armor to secure an entry-level position in the fashion industry”
      - “High school student applying to the Johns Hopkins University Whiting School of Engineering where I plan to major in Electrical Engineering”
      - “Career administrator looking to relocate to the Baltimore-DC area”
- **Activity 1: ask your supervisor for a copy of their resumé**

## Task 2:

- Detail your educational experiences
  - o Most recent experience first
  - o Name of school on the left, graduation or anticipated graduation date on the right

- Cristo Rey Jesuit High School Sept 2015 to May 2019
  - Include all important accomplishments and notable projects
    - GPA
    - Honor rolls terms, awards, etc.
    - List any academic competitions you've participated in
    - List notable projects especially ones that have involved work outside of the school.
    - Be sure to list everything as individual bullet points
- Detail all of your professional experiences
  - Most recent experience first
  - Name of company on the left, years worked for on the right
    - Legg Mason Financial April 2018 to Present
  - Include all responsibilities and accomplishments
    - List the various tasks you were responsible for
    - List any awards or notable projects as individual bullet points
- **Activity 1: Ask supervisor who their references are and why**
- **Activity 2: Pick 4 items on supervisors resumé you want to learn more about**

### Task 3

- Research company
  - Full-time applicants to a company are expected to know about the job they're applying for
    - Learn about the company's history, products and services, and role in the community
    - Think about what a full-time job at the company will really be
- Show enthusiasm
  - No matter what you want the person interviewing you to know that this is the job you want. Show enthusiasm no matter what.
  - Dress for the job you want, not the job you have
  - Bring copies of your resumé to your interview
- Think about your strengths
  - Each job as a "Job Description" - find a way to work the job description into your interview and how your strengths meet that description.
  - what part of your resumé are your biggest strengths.
- Honesty goes a long way
  - If you have questions about the job ask them

- Be honest about your own weaknesses – if you struggle with something (using Excel, bad handwriting, etc.) don't be afraid to say that is your biggest weakness.
- **Activity 1: Ask supervisor about interview experience**
- **Activity 2: Use your communication and technical skills to schedule time for a mock “interview” with your supervisor. Supervisor should find time to “interview” you the following week for a pretend position**

#### Task 4

- Print at least 3 copies of your resumé for your interview (one for you, one for interviewer, one just in case)
- Have your supervisor “Interview” you
  - Identify 2 experiences (educational or professional) that are most relevant to the position
  - Identify 3 questions about the position you want to ask
- Follow up
  - Send a follow-up email to the person who interviewed you (your supervisor). Thank them for the opportunity to speak and let them know they can contact you with any questions

# Workplace Financial Literacy



= Student Task

= Supervisor and Student



**Objective: Learn how to create a personal budget sheet and gain knowledge of financial literacy in the workplace.**

Task 1: Meet with Human Resources representative at your company



Task 2: Learn about budgeting and future expenses after high school



Task 3: Learn about Monthly Income and expenses



Task 4: Learn about work benefits and pay



Task 5: Evaluate your future career outlook



Task 6: Introduce student to HR representative



Task 7: Meet with student to see if they have questions about budgeting



Task 8: Meet with student to see if they have questions about expenses



Task 9: Help explain work benefits to student



Task 10: Ask students to go over websites in worksheet



\*Students we have also included some websites in binder for you to look at if you are at home and want to continue your financial learning while not at your internship\*

\*Supervisors- we have included a list of all the websites the students will be looking at. They will all be listed on one seat in this binder. If you also have the time, take the chance to look at these websites to help better assist your intern.\*

#### Task 1

- With your supervisor meet with the HR rep.
  - o (Record their name and contact information for future use.)
- Briefly talk with the HR rep and ask them the following questions:
  - o Can you describe your position for me? Help me understand what you do for the employees here and myself.
  - o Why do you think it is important to seek financial and personal help from HR at times?
  - o What are the differences between direct deposit and check cashing?
  - o What is credit, and why can it be helpful in the future?
- During your break today take a look at these sites in order to learn some helpful financial tips and about credit.
  - o The 5 Basics of Financial Literacy
    - <https://www.larmannfinancial.com/resource-center/money/the-five-basics-of-financial-literacy#section0>
  - o The 101 Guide to Your Finances
    - <https://bettermoneyhabits.bankofamerica.com/en/personal-finance-101>
  - o 7 Baby Steps (to Financial Wellness)
    - <https://www.daveramsey.com/dave-ramsey-7-baby-steps>
  - o Credit Resources
    - <https://www.mdcashacademy.org/Resources-Credit>
  - o Credit Card Basics
    - <https://www.nerdwallet.com/blog/credit-cards/credit-card-basics-high-school-students/>

#### Task 2

- Think about the expenses you currently have. Where do you think majority of your money/spending goes to?
- Begin to keep track of your daily spending. Use or create a Daily Spending Journal.
- Look up the term budgeting. Why is it necessary?
- What are some possible expenses you might incur later in college or after high school? List them.
- During your break today take a look at these sites in order to learn more about budgeting and post high financial advice.
  - o Budgeting resources
    - <https://www.mdcashacademy.org/Resources-Budgeting>
  - o Interactive Budget Worksheet
    - <https://www.cicmoney101.org/Calculators/Budget-Worksheets/High-School-Student.aspx>
  - o Budget Worksheet
    - <https://www.familyeducation.com/printables/parenting-tools-printables/teen-budget-worksheet>

- Financial Tips for College
  - <https://bettermoneyhabits.bankofamerica.com/en/college>
- Student Loans resources
  - [https://www.mdcashacademy.org/Resources\\_Student\\_Loans](https://www.mdcashacademy.org/Resources_Student_Loans)
- FastWeb
  - [https://www.fastweb.com/ppc?utm\\_source=google&utm\\_medium=ppc&mkw=fastweb&gclid=CjwKCAjwpuXpBRAAEiwAyRRPgWq8G5xycDXybsELemjs31ySes1TYalyd5D5YN1CmmBNvd2ZUhl-ChoCmHUQAvD\\_BwE&pcrid=142825599267&mkwid=skpRZvTSI&pmt=e](https://www.fastweb.com/ppc?utm_source=google&utm_medium=ppc&mkw=fastweb&gclid=CjwKCAjwpuXpBRAAEiwAyRRPgWq8G5xycDXybsELemjs31ySes1TYalyd5D5YN1CmmBNvd2ZUhl-ChoCmHUQAvD_BwE&pcrid=142825599267&mkwid=skpRZvTSI&pmt=e)
- Advice for High School Graduates
  - <https://cashmoneylife.com/financial-advice-for-the-high-school-graduate/>

### Task 3

- Determine your monthly income and expenses from the budget you created last week (Check worksheet links above for assistance)
  - What have you learned from your daily and monthly spending?
  - Do you have any plans or big purchases in the future you need to save up for?
- During your break today take a look at these sites in order to learn more about spending and saving.
  - Spending Analysis Tool
    - <https://bettermoneyhabits.bankofamerica.com/en/saving-budgeting/spending-tool>
  - A simple guide to saving money
    - <https://bettermoneyhabits.bankofamerica.com/en/how-to-manage-your-savings>
  - Financial Education
    - <https://www.pnc.com/en/about-pnc/corporate-responsibility/corporate-social-responsibility/communities-green/financial-education.html>

### Task 4

- Schedule a meeting with the HR representative or someone in the office who would be willing to discuss the following (discussion takes approximately 10-15 minutes):
  - What is a 401(k) and why will you need it in the future?
  - What are W-2 and W-4 forms used for? How should you fill one out?
  - What are some common work benefits an employer gives to its employees?
  - What are taxes and how do they affect your pay?
  - From your discussion with the HR rep list your benefits and current pay rate as an intern. What are some benefits you would like from your future job?
- During your break today take a look at these sites to learn more about work benefits and taxes.
  - Types of Employee Benefits & Perks
    - <https://www.thebalancecareers.com/types-of-employee-benefits-and-perks-2060433>
  - Tax resources
    - [https://www.mdcashacademy.org/Resources\\_Taxes](https://www.mdcashacademy.org/Resources_Taxes)

#### Task 5

- Where do you see yourself in five years? Ten years?
- What's next for you after high school?
- What is your dream job/career?
- Research and record the salary and requirements of the job/career you hope to obtain.
- What are some obstacles that you'll need to overcome in order to get this dream job/career?
- Here's a few links to assist you with your job search:
  - The Balance Careers – Job Search, Career and Employment Advice
    - <https://www.thebalancecareers.com/job-search-4161939>
  - EducationPlanner – Find Careers
    - <http://www.educationplanner.org/students/career-planning/find-careers/index.shtml>



## **Supervisor Resources**

List of links your interns will be viewing

### **Bank of America – Better Money Habits**

- <https://bettermoneyhabits.bankofamerica.com/en/saving-budgeting/spending-tool>
- <https://bettermoneyhabits.bankofamerica.com/en/how-to-manage-your-savings>
- <https://bettermoneyhabits.bankofamerica.com/en/personal-finance-101>
- <https://bettermoneyhabits.bankofamerica.com/en/college>

### **Budget Worksheets**

- <https://www.cicmoney101.org/Calculators/Budget-Worksheets/High-School-Student.aspx>
- <https://www.familyeducation.com/printables/parenting-tools-printables/teen-budget-worksheet>

### **Cash Money Life**

<https://cashmoneylife.com/financial-advice-for-the-high-school-graduate/>

### **Dave Ramsey – 7 Baby Steps**

- <https://www.daveramsey.com/dave-ramsey-7-baby-steps>

### **EducationPlanner – Career Finder**

- <http://www.educationplanner.org/students/career-planning/find-careers/index.shtml>

### **FastWeb**

- [https://www.fastweb.com/ppc?utm\\_source=google&utm\\_medium=ppc&mkw=fastweb&gclid=CjwKCAjwpuXpBRAAEiwAyRRPgWq8G5xycDXybsELemjs31ySes1TYalyd5D5YN1CmmBNvd2ZUhl-ChoCmHUQAvD\\_BwE&pcrid=142825599267&mkwid=skpRZvTSI&pmt=e](https://www.fastweb.com/ppc?utm_source=google&utm_medium=ppc&mkw=fastweb&gclid=CjwKCAjwpuXpBRAAEiwAyRRPgWq8G5xycDXybsELemjs31ySes1TYalyd5D5YN1CmmBNvd2ZUhl-ChoCmHUQAvD_BwE&pcrid=142825599267&mkwid=skpRZvTSI&pmt=e)

### **MD Cash Campaign - Resources**

- <https://www.mdcashacademy.org/Resources-Budgeting>
- <https://www.mdcashacademy.org/Resources-Credit>
- [https://www.mdcashacademy.org/Resources\\_Student\\_Loans](https://www.mdcashacademy.org/Resources_Student_Loans)
- [https://www.mdcashacademy.org/Resources\\_Taxes](https://www.mdcashacademy.org/Resources_Taxes)

### **NerdWallet - Credit**

- <https://www.nerdwallet.com/blog/credit-cards/credit-card-basics-high-school-students/>
- <https://www.nerdwallet.com/blog/credit-cards/top-credit-card-tips-students/>

### **PNC – Financial Education**

- <https://www.pnc.com/en/about-pnc/corporate-responsibility/corporate-social-responsibility/communities-green/financial-education.html>

### **The BalanceCareers**

- <https://www.thebalancecareers.com/types-of-employee-benefits-and-perks-2060433>
- <https://www.thebalancecareers.com/job-search-4161939>

**Student Resource**

Fun Activities to do during breaks or at home:

- <https://jeopardylabs.com/play/financial-literacy157>
- <https://jeopardylabs.com/play/financial-literacy-jeopardy>
- <https://jeopardylabs.com/play/financial-literacy2>

# Internship Experience Recap



= Student Task

= Supervisor and Student



**Objective: Be able to recap on your internship experience on the year. Give your supervisor feedback on your year.**

Task 1: Reevaluate your surveys and assessments from the year



Task 2: Update any of your social media



Task 3: Update your resume



Task 4: Ask your supervisor to conduct an exit interview



Task 5: Meet with student to review surveys and assessments



Task 6: Check in with student on social media pages



Task 7: Meet with student to review their resume updates



Task 8: Conduct an exit interview with student



#### Task 1

- Take a look at all your assessment and surveys you completed over the past year
  - o Did you turn you need improvements into strengths?
  - o Have you been able to deal with conflict better?
  - o Have you practiced any of your leadership skills?
  - o How is your budget looking?
- Make sure all your spreadsheets are updated that you may have worked on in the Computer Skill section

#### Task 2

- Update any of you social media
  - o New Job Descriptions on LinkedIn
  - o Maybe you want to change somethings you have listed or re- edit your social media sine you last did that in Building Your Brand Month

#### Task 3

- Take another look at your resume
  - o Make sure update job descriptions, length of time at job, GPA
- Check with your supervisor to make sure you are explaining everything you did while at internship.

#### Task 4

- Congratulations you made it! We want you to give your supervisor some feedback but they also want to receive some from you. They will be conducting an exit interview and asking the following questions
  - o Have you accomplished your goals set during the year?
  - o Have you enjoyed the internship, any suggestions they may have for next year?
- This would be a good time to write that thank you email we talked about in Computer Skills section.