



Glavin Glavin Office of International Programs

Joint Management Consulting Field Experience

UNDERGRADUATE JMCFE STUDENT MANUAL

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Undergraduate JMCFE Student Manual

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I. INTRODUCTION

Overview of the JMCFE Program

Congratulations on being selected to participate on an undergraduate student JMCFE (Joint Management Consulting Field Experience) team! We hope this experience will prove as valuable to you as it has to past participants. Should you have any questions about the contents of this manual or the project itself, your faculty advisor or the program manager can assist you. This undergraduate team manual was created to assist Babson students participating in the Joint Management Consulting Field Experience (JMCFE).

The JMCFE Program recommends solutions to the business problems of sponsoring companies and provides Babson College students with valuable, practical work experience. Teams of Babson students have been collaborating with students from overseas universities since the implementation of the JMCFE program in 2002. The program also supports an 'International MCFE' format that pairs students directly with an overseas company. Babson students have worked at the undergraduate and graduate levels with students from Switzerland, Germany, Chile, Costa Rica, Peru, and with companies from around the world.

JMCFE Teams

JMCFE teams typically consist of three students from Babson and three students from the partnering academic institution. In addition, each student team is assigned a faculty advisor from their respective schools. Advisors are chosen based on their professional/academic expertise and experience and are asked to commit to weekly meetings with their faculty counterpart, their student team and with the combined weekly project team.

Projects are conducted during either the fall or spring semester over a period of approximately 15 weeks. Babson students begin the project by traveling to the sponsoring company prior to the semester start. This week long stay allows students to meet team members and clients, and to begin the engagement process. At semester's end the partnering schools students and advisor travel to Babson to complete the final report and present their findings and recommendations to their client.

Faculty Advisors

The faculty advisors are assigned to advise the team on its work, rather than assist in the work. The advisor will make himself/herself available to the team for regular meetings and discussions, as well as to give the team guidance and feedback on both process and content. It is the student's responsibility to effectively utilize the faculty advisor as a resource. The advisor is also responsible for grading the students on an individual basis; however he/she will base this evaluation on a student's individual performance as well as the team's performance. It is expected that both institutions will grade their students on the project (process and content) and students will be enrolled in the project as a course, for credit towards their graduation requirements.

Communication with your team advisor is of utmost importance! Regular meetings, separate from conference calls with the partnering team are the forum to bring up any issues or questions you have. You must take responsibility for managing this professional relationship.

Grading Criteria

Undergraduate Grading

The faculty advisor will inform the JMCFE team of the criteria for determining each person's individual grade. Grades are assigned individually and are confidential.

Your final grade will be based upon two major criteria:

- Task of fulfilling the terms of the engagement contract.
 - Final Presentation
 - Written Report
- Process of completing the project and maintaining the advisor/client relationship.
 - Teamwork – Ability to work with advisor and JMCFE team
 - Meeting Commitments
 - Producing Quality Work
 - Demonstrating excellence in Babson Core Competencies

(Decision Making; Listening; Leadership; Communication; Teamwork; Ethics) (Exhibit 5)

II. STUDENT ROLE IN A JMCFE PROJECT

Throughout the Project:

Focus Effort:

- Focus on dividing the workload among the group.
- Share information from individual work with team members to provide a complete, overall picture of the project.
- Establish a realistic project scope with the client, based on their request, timeline and abilities.
- Elect a member to be the communication liaison with the faculty advisor.

Manage Time:

- Your JMCFE project should be treated as a true consulting project; utilize time management to avoid leaving too much work for the end (approximately 10-12 hours per week/per person is expected).
- Student teams are responsible for scheduling and establishing agendas for meetings with their JMCFE advisors. Teams should ensure that this time is used effectively to address specific concerns or issues that affect successful completion of the JMCFE project.
- All members of the JMCFE team must be available a minimum of 1.5-2 hours a week (Wednesday mornings) for a scheduled conference call with your international teammates. Regular team meetings outside of this meeting are also required of the teams and should be scheduled by the team.

Group Participation and Issues:

- Carry your weight. Don't allow yourself and others in the group to contribute less than is expected.
- Discuss conflicts as a group, including any individual performance concerns. If this doesn't produce results, then consult your faculty advisor about group management solutions.
- Apply a global mindset to your project participation, incorporating the value of multicultural perspectives and approaches to solutions and problem solving.

End of Project:

- An acceptable project should contain both carefully prepared graphics and text to appear professional.
- Institutional and Company logos should be listed on the report and the 'JMCFE' title should be included with the year of the project, as a footer, on each page of the report.
- Have each team member read the whole report thoroughly.
- PROOFREAD, PROOFREAD, PROOFREAD!!!!
- The final project should be comprehensive but to the point.

Practice Presentation:

- Develop the presentation as a group, and have each member know his or her part. Not every member will need to present but will be expected to participate in the Q&A.
- Prepare a script for members to follow.
- Practice the presentation 3-4 times in a dry run format without a captive audience. Critique teammates during this process.
- Give the facts and be able to substantiate your statistics and why your group made the recommendations it did.
- Help each other, if appropriate, in the question and answer session after the presentation comes to a close.
- Be prepared for a dry run rehearsal with your speech consultant and advisor.

Enjoy Your Project:

- Participating in a JMCFE can be a worthwhile and challenging experience. Many groups bond and develop close friendships as a result of their participation in the course.
- The JMCFE experience will be as fulfilling as you make it. The common traits that drew you to this project: a passion for learning, drive to succeed and strong interest to make a difference, are the same characteristics needed to succeed in JMCFE.
- Last but not least, you will learn about your cultural adaptiveness and work style in an intercultural group setting; traits that are necessary when seeking employment opportunities abroad. Pay attention to the lessons you've learned along the way.

III. ADVISOR'S ROLE IN A JMCFE PROJECT

Goals of the Advisor

The advisor's goal is to provide quality control for the project and to assist the team when requested. The purpose of this section is to briefly inform the JMCFE team participants of the goals of the advisor, which are as follows:

- The faculty advisor is to advise the team on its work, rather than assist the team with the project. The team should keep the faculty advisor informed and updated of the team's progress and challenges via emails and regular meetings.
- The advisor is also responsible for ensuring that all deliverables meet acceptable standards. They evaluate and provide developmental feedback to students as well as review and suggest revisions for all major deliverables including: the Engagement Contract (letter of scope); the Midterm Progress Report to Client; the Formal Written Report; and the Final Presentation.
- Set expectations regarding the frequency of meeting with the team as well as the preferred method of communication. The advisor should be available to teams for weekly meetings and discussions throughout the semester as deemed necessary. It will be the team's responsibility to manage the scheduling and agenda for these meetings.
- Attend the team's presentation rehearsal with the speech consultant and provide feedback on the content of the project.
- Attend the final presentation for the JMCFE project.
- Assign each team member a final grade and debrief the project with the team and the sponsor company, as well as with the FHS delegate.

IV. HELPFUL HINTS

How to best utilize Blackboard

Your JMCFE Team Blackboard site is set up to allow you to have a structure for storing information and organizing your work. Here are a few tips on what you might want to use your JMCFE Team Blackboard site for:

- Keeping track of meetings. For example, a record of what happened at the meetings, who attended, and what you accomplished at the meetings. You should also post any agendas or documents that were relevant to that meeting.
- Keeping copies of the completed deliverables and drafts that are due on Blackboard, allowing everyone access to these documents at any time.
- Your team may use alternate methods of tracking work and maintaining communications with your team. The program manager can assist you in establishing these.

V. PROFESSIONAL CONDUCT

Babson College affirms its commitment to provide a fair, humane, and respectful environment for all of its employees and students. It is the policy of the college to maintain a working and learning environment free from disrespectful conduct and communication. Every member of the Babson community has the right to live, learn, work, and otherwise participate in an environment free from all other forms of harassment by any other members of the Babson community.

As a participant of the Babson JMCFE Program, you are considered a member of the Babson community and a thorough and respectful appreciation of the relationship between student and advisor is to be reinforced. The JMCFE program is viewed as a professional education where students are considered members of the business team. Therefore, it is our policy that relationships between students and JMCFE advisors be maintained strictly on a professional level.

Detailed policies of Babson College regarding discrimination, harassment, and other related issues are contained in the undergraduate and graduate student handbooks. The JMCFE office is also available for further clarification for both JMCFE students and JMCFE advisors.

VI. DELIVERABLES

Confidentiality Agreement

Each of the members of the JMCFE team and the advisors are required to individually sign a Confidentiality Agreement, which will restrict Babson participants of the JMCFE Project from disclosing any of the trade secrets or proprietary information of the sponsor company. The Confidentiality Agreement must be submitted to the JMCFE office before the commencement of the JMCFE Project. **(Exhibit 1)** Additionally, the company sponsor may also require their own contract of confidentiality to be signed at the commencement of the project.

Engagement Contract (Letter of Scope)

Each JMCFE team member will prepare the engagement contract which will serve as a contract that binds the students, advisors and sponsor company to an acceptable agreement regarding the work to be accomplished in the JMCFE Project. All parties need to determine realistic goals for the semester.

A typical Engagement Contract will first state the project mission, objectives and the final deliverables. In addition, it should define the methodology that the team will use to gather the necessary information to complete the project. The Engagement Contract should also include a schedule the team will follow (timeline).

Estimated project expenses should be included in the Engagement Contract. All research, printing and other project related expenses incurred by the team will be charged to the client through the program manager. The client will be responsible for all expenses incurred during the project. Assign one team member to keep track of expenses and submit an expense report to the program manager, with receipts. The report should include what the purchase was, when it was made, who made the purchase, etc. The JMCFE office is not responsible for managing or processing these expenses.

The Engagement Contract must be prepared and approved by the advisor and the client and submitted to the JMC FE office according to the project deliverable schedule. (See **Exhibit 2** for a Sample Engagement Contract.)

Team Timeline

A Team Timeline needs to be established to identify deadlines for the completion of separate components of the JMC FE project and must be submitted to the advisor and program manager as outlined in the deliverable schedule. It is essential to divide the project into smaller sections. The advisor will assist the team in developing the timeline. The use of work breakdown techniques is important (See **Exhibit 3**). As an example, a previous JMC FE team outlined the stages in preparation of a Team Timeline as follows:

- Create a list of all objectives to be completed. Determine if these objectives need to be broken down into sub-divisions. Prioritize the list.
- Create a list of all due dates for the project, (i.e., Engagement Contract, timeline, progress reports, final written report, progress meetings with client, etc.).
- Start charting all of the assignments with due dates already established. This will create a frame for the rest of the tasks.
- Include on the chart Spring break and other important college activities and holidays for both institutions (if applicable).
- With the dates in place, decide when the paper will be written, when the development of the presentation will be, and when the ‘dry run’ oral presentation will be rehearsed with the speech consultant (this date is set by the program).
- Realizing that more than one thing can happen at once, assign team members to each task and due dates for the team members to report back with their final findings to the team.

Midterm Progress Report

A Midterm Progress Report is an overview of the project prepared by the team and should be scheduled with the client to be delivered according to the deliverable schedule. It serves as a progress report of the Engagement Contract (Letter of Scope) and reviews what tasks are left to be completed. It should include but is not limited to:

- Progress to date
- Preliminary findings
- Problems
- Plans for the remainder of the project

The Progress Report must first be submitted to the advisor for review. Then, you will present it to the sponsor company at the mid-point of the project.

Cultural Reflection Paper

By a date set by the program, students should submit a one page reflection on their cultural growth over the semester. It can include initial expectations and how those were met or not met/changed over the semester; new insights; examples of culture they experienced/appreciate, etc. This paper should be sent to your faculty advisor and program manager and it kept confidential.

Oral Presentation and Written Report

Presentation Dry Run

Each team is required to work with a professional speech consultant prior to the final presentation to the sponsor company. The JMCFE office assigns each team a speech consultant and reserves rooms for the practice presentations and sets the date for the 'dry run' of the presentations. Plan to conduct these presentations in the morning to give you time to address changes that need to be made.

Responsibilities of the Speech Consultant

Each JMCFE team is responsible to meet with a speech consultant to aid them in the presentation of the JMCFE project. Although the speech consultant offers insights on improving the effectiveness of the oral presentation, he or she is not responsible for the content of the presentation. Speech consultants are responsible for critiquing the structure, logic, style, delivery, and overall effectiveness of oral presentations. In addition, the consultants will work with the teams before presentations are due to ensure that presentation skills are at a professional level.

Final Oral Presentation

A team presentation will be delivered to your client at Babson. The final oral presentation to the sponsor company should take between 30 and 40 minutes in length. (This does not include time for greeting the representatives of the sponsor company, the question and answer session, and team meeting to follow.) This PowerPoint presentation should contain both company and institutional logos on all slides. Be aware there will also be at least one member from Glavin Office of International Programs Office in attendance at the final oral presentation, as well as other interested parties from Babson.

Written Report

A formal written report must be submitted to the Glavin Office of International Programs (JMCFE Office) in both hard and electronic copy format, a hard copy to the project advisor and to the sponsor company attendees at the conclusion of the JMCFE project. You will be required to submit an electronic copy of your written draft to your advisor prior to your final presentation (see deliverable schedule) as well as a hard copy to your advisor at the time of the final presentation. It is customary to distribute a copy of the final written report to the client as well. This written report should contain both company and institutional logos on cover and title pages. The writing center at Babson is available for consultation on the development of this written business report.

VII. EVALUATIONS/PERFORMANCE REVIEWS

Midterm Evaluations and Performance Reviews

You will be required to complete Self, Peer, and Team evaluations at the midpoint of the project. Your advisor will provide you with these forms (see example in **Exhibit 4**). Please consult the deliverable schedule for specific dates and details.

Final Evaluations and Performance Reviews

You will be required to complete an online JMCFE Program Evaluation following the Final Oral Presentation and submission of the Final Written Report.

Teams should anticipate meeting with their advisor for a project debrief after the final paper and presentation have been delivered to the client.

EXHIBIT 1
SAMPLE JOINT MANAGEMENT CONSULTING FIELD EXPERIENCE PROGRAM
CONFIDENTIALITY AGREEMENT

During the term of this Agreement, or any continuation thereof, the undersigned – a student or faculty member of the Joint Management Consulting Field Experience Program (the “Program”) – as a member of a JMCFE team (the “Team”) may have access to and become acquainted with various trade secrets and proprietary information that are owned by <**Sponsor Company**> (the “Company”). The undersigned agrees that he or she will not disclose or cause to be disclosed any of the aforesaid trade secrets and proprietary information, directly or indirectly, or use them in any way, either during the terms of the Program or at anytime thereafter, except as required in the preparation or presentation of the Program’s Project (the “Project”) or as otherwise authorized by the company in writing.

For the purpose of this Agreement, trade secrets shall include but not be limited to information disclosed to or known by the undersigned as a consequence of or through association with the Company, but shall not include information obtained from sources available to the general public or information which is not treated by the Company as confidential or proprietary.

At the conclusion of the Program (or at such time as s/he is no longer a participant therein), the undersigned will deliver to the Company all items provided by the Company or developed by the undersigned and his or her Team in connection with the Projects that remain in my possession. Except as provided in the letter agreement between the JMCFE Program and Company, neither Babson College nor the undersigned will retain copies, electronic files, reproductions or written information relating to the Projects beyond the conclusion of the Program.

During the term of the Program, the undersigned will carefully control access to trade secrets and proprietary information and will apply due caution in displaying the same to ensure that trade secrets and proprietary information relating to the Projects are not visible to persons other than those students who are members of the undersigned’s Team and their Faculty Advisor.

During and after the completion of the Program and for a period of five (5) years thereafter, the undersigned shall not publish, release or otherwise make available to any other party information regarding the Project, elements of the Project, preliminary or final Project deliverables or any other information that may contain trade secrets and proprietary information.

The undersigned shall be solely responsible for any liability arising from his or her failure to abide by the terms of this Agreement.

If this letter accurately reflects your understanding, please acknowledge by signing below and returning this letter to the Babson Glavin Office of International Programs.

I UNDERSTAND AND AGREE TO ABIDE BY THE TERMS OF THIS CONFIDENTIALITY AGREEMENT.

By: _____<**student or faculty name**>

Signature: _____

Date: _____

EXHIBIT 2

SAMPLE ENGAGEMENT CONTRACT (LETTER OF SCOPE)

BABSON COLLEGE MANAGEMENT CONSULTING FIELD EXPERIENCE (JMCFE)

PROJECT FOR: *(COMPANY NAME)*

PROJECT TITLE: ADVERTISING OVER THE INTERNET

Project Mission:

To research and develop an effective way to expand the current target market of *(COMPANY NAME)*, via the Internet, with considerations to any legal ramifications.

Project Objectives:

- A. To understand the motivations involved with becoming a client of *(COMPANY NAME)*;
- B. To gain basic knowledge of the Internet (i.e. the use of the telecommunication super-highway);
- C. To research any and all laws and regulations relating to the marketing of *(COMPANY NAME)* over the Internet;
- D. To determine how *(COMPANY NAME)* can effectively use or incorporate the Internet, and develop a strategy for utilizing the Internet, in its marketing efforts; and
- E. To facilitate the solicitation of new clients for *(COMPANY NAME)*.

Project Scope:

The team will focus on expanding the target market within North America only. Research and recommendations will include creative design ideas, new technologies, and effective strategies but will exclude technical web site design instructions or actual web development for *(COMPANY NAME)*.

Deliverables:

1. A written report will be provided which will explain how the Internet can be used by businesses, in general, and by *(COMPANY NAME)*, specifically. The report will make recommendations about the future development of marketing efforts relating to *(COMPANY NAME)*.
2. An oral presentation will be made that gives real examples of how the Internet can be used within the company and how to go about starting and maintaining this process.

Project Methodology:

The JMCFE Team will use the following resources to collect information for the project:

- Conference calls with selected members of *(COMPANY NAME)*;
- Literature research of *(COMPANY NAME)* activities and events;
- Literature research of information on the Internet;
- Participation in an informational course about the Internet; and
- Research of any legal issues relating to the Internet.

Schedule:

- Meet weekly with both Babson & FHS team members to review progress.
- Prepare Progress Report scheduled to be presented to client on ____ (date) ____.
- Prepare Executive Summary of project by ____ (date) ____.
- Prepare Final Presentation by ____ (date) ____.
- Prepare Final Written Report by ____ (date) ____.

NOTE: The schedule may be changed upon the mutual consent of the parties involved.

Expectations:

- The client will call the necessary customers and let them know that we will be contacting them and that it is acceptable to answer our survey.
- The client will....
- The team will provide updates to the client on a weekly basis via e-mail or phone.
- The team will....

Project Expenses:

The total expenses that (COMPANY NAME) will incur for the project will not exceed \$300.00. Any expenditure in excess of this amount will be negotiated and agreed upon in advance. The JMCFE team treasurer, (STUDENT NAME), will maintain an itemized record of expenses and receipts.

Statement of Confidentiality:

All project results and written reports will become the sole property of (COMPANY NAME), and will not be available to outside parties without the written consent of (COMPANY NAME).

JMCFE members are solely representing themselves throughout the project as Babson College undergraduate students. When questioned about the end-use of the research, the JMCFE team can disclose that (COMPANY NAME) is sponsoring the project, but they are not employees or representing (COMPANY NAME) in any capacity.

The undersigned have read the above and agree to its specifications. All changes must be made in writing and mutually agreed upon and approved by (COMPANY NAME) and the JMCFE team members.

(CLIENT NAME) Date
(COMPANY NAME)

Babson College JMCFE team members:

(STUDENT NAME) Date (STUDENT NAME) Date

(STUDENT NAME) Date (STUDENT NAME) Date

(STUDENT NAME) Date (ADVISOR NAME) Date

EXHIBIT 3 SAMPLE TEAM TIMELINE

This is just a sample timeline. In addition to the events and deliverables listed here are weekly Team meetings and meetings with your Advisor. You should spend time creating your Timeline since part of your grade comes from how closely you come to completing all the tasks by the due dates that you list. Every Team's Timeline should be unique to their project.

DATE	EVENT/DELIVERABLE	RESPONSIBILITY
January		
	Orientation	Team, Advisor.
	Company Meeting	Team, Advisor.
	Meet with Sponsor Company	Team, Advisor .
	Individual Commitment Letter	Team, Advisor
	Code of Conduct	Team, Advisor
	Team Timeline	Team
	Engagement Contract	Team, Advisor
February		
	Update Meeting	Team, Advisor
	Meet with Sponsor Company	Team
	Evaluations: Self, Team Members, Team	Team
	Midterm Review of Individual & Team	Team
	Midterm Progress Report	Team
	Midterm Progress Discussion	Team, Advisor.
	Meet with Sponsor Company	Team
March		
	Submit Date/Time of Final Presentation	Advisor.
	Meet with Sponsor Company	Team, Advisor
	2nd Rough Draft of Written Report	Team
	Meet with Sponsor Company	Team
	Rough Slides of Final Presentation Done	Team
	Spring Break	Team, Advisor
April		
	Final Slides Completed	Team
	Draft of Paper to Advisors	Team
	Meet with Speech Consultant	Team
	Final Oral Presentation & Written Report	Team
	Learn, Apply, Share Paper	Team
	Final Evaluations: Individual & Team	Team
	Final Review of Individuals & Team	Team, Advisor
	Program Evaluation	Team, Advisor

EXHIBIT 4 SAMPLE TEAM EVALUATION FORMS

TEAM MEMBER/SELF EVALUATION FORM

BABSON COLLEGE
Undergraduate MCFE Team
INDIVIDUAL EVALUATION FORM

Date: (Date)
Team Name: (Team Name)
Team Member Name: (Your Name)

This is an Evaluation of: (I.E. Self/Team/or Individual Team Member)

This evaluation provides an opportunity for team members to rate their peers and themselves. All of the evaluation forms are confidential, so please be open and frank in your comments. At the time of review, the Advisor and team member must sign the bottom of the page signifying agreement.

Please respond to each of the following criteria using the following rating scale:

5. Exceptional -- Far exceeds project standards, even on some of the most complex parts of the project.
4. Above Average -- Consistently exceeds project standards.
3. Average -- Consistently meets project standards.
2. Below Average -- Rarely meets project standards.
1. Unsatisfactory -- Does not meet project standards.

1) *Empathy*

Shows patience and respect when dealing with others.

1 2 3 4 5

Comments: _____

2) *Sense of Commitment*

Meets goals and shows the commitment necessary to complete the task..

1 2 3 4 5

Comments: _____

3) *Proactivity*

Initiates the necessary steps to further the project without being prompted.

1 2 3 4 5

Comments: _____

4) *Resource Optimization*

Understands the relationships involved in the organization and uses those relationships to build channels of communications, support for the Projects, etc. Is creative in seeking out new contacts and referential sources where needed. .

1 2 3 4 5

Comments: _____

5) *Use of Interpersonal Skills*

Recognizes the need to treat people with respect and as individuals, and practices varied techniques of interaction with different types of people. .

1 2 3 4 5

Comments: _____

6) *Communication Skills*

Listens to others, builds upon their ideas and maintains focus.

1 2 3 4 5

Asks good questions and contributes own ideas. .

1 2 3 4 5

Comments: _____

7) *Responsibility*

Attends meetings, meets deadlines, returns calls and completes the assigned workload.

1 2 3 4 5

Comments: _____

8) *Contribution to Team Cohesiveness*

Works well with others and contributes positively to completion of the Project.

1 2 3 4 5

Comments: _____

Student Signature

EXHIBIT 5

BABSON CORE COMPETENCIES

Leadership and Teamwork

Leadership is the ability to influence others to obtain goals and objectives without incurring hostility. Teamwork is the ability to work effectively with others to compromise, collaborate, communicate, listen, respect and share constructively to obtain established goals and objectives.

Entrepreneurial and Creative Thinking

Babson graduates apply the essentials of entrepreneurial thinking to a variety of endeavors; they are versatile and creative contributors who are adept at initiating, implementing, and managing change. Creativity is the demonstration of the ability to look for new approaches to problem solving and to be open to the ideas of others.

Critical and Integrative Thinking

Although Babson graduates are exceptionally competent in their chosen fields, they understand the limiting nature of the artificial barriers between disciplines and utilize an integrated, holistic approach to learning and decision making.

Ethics and Social Responsibility

Babson graduates are prepared and willing to be responsible members of society; they are committed to continually developing intellectual, ethical, social, and professional character and abilities. They have frameworks for understanding that ethics are an integral feature of all personal, social, and professional considerations. They think ethically, are accountable and accept responsibility for their actions.

Global and Multicultural Perspectives

Babson graduates know the historical and cultural context in which they live, work and operate, and meet the challenges presented by a world characterized by diverse cultures and ways of knowing.

Rhetoric

Rhetoric is communication in the broadest sense, encompassing reading, and writing and oral communication abilities. Babson graduates will demonstrate their ability to formulate, explore, reflect, analyze, and communicate critically and effectively. This includes the organization, critical evaluation and mechanical abilities required for analyzing and expressing ideas.

Quantitative Analysis

Developing a competency in numeracy is based on learning to use numbers as a language. Moving beyond the rudiments of basic calculative practices, a *numerate* person is capable of communicating their ideas and conclusions effectively by shaping, analyzing and validating mathematical logic and reasoning.

GRADING COMPETENCIES

EMOTIONAL INTELLIGENCE (EQ) COMPETENCIES

Competencies

Leadership Competency	
LEADERSHIP:	Effectiveness in influencing others to accomplish a task and in getting ideas accepted without incurring hostility.

The following are of the behaviors that can be observed when an individual is displaying a high level of effectiveness in a formal or informal leadership role:

- ☐ Helps self and others understand goals or tasks to be achieved.
- ☐ Consistently keeps group focused on its task and tracks progress.
- ☐ Draws ideas and suggestions from others.
- ☐ Encourages both a focus on the task, and group harmony
- ☐ Group members don't usually react to this individual's efforts with hostility.
- ☐ Rarely dominates or overpowers the group.
- ☐ Demonstrates sensitivity to group progress and process.
- ☐ Shows enthusiasm for task.
- ☐ Uses a variety of influence strategies effectively.
- ☐ Demonstrates an awareness of cultural diversity in efforts to influence others.

The following are of the behaviors that can be observed when an individual is displaying moderate effectiveness in a formal or informal leadership role:

- ☐ Generally attempts to move group toward goal, although may occasionally get off track.
- ☐ Sometimes encourages the involvement of other group members.
- ☐ Sometimes commands or dominates others, though not all the time.
- ☐ Shows moderate sensitivity to group progress and process.
- ☐ Shows some enthusiasm for the task.
- ☐ Tends to use only one or two influence strategies with mixed results.

The following are of the behaviors that can be observed when an individual is displaying a low level of effectiveness in a formal or informal leadership role:

- ☐ Shows little or no desire to influence the group, or tries too hard to force the group into his or her way of thinking.
- ☐ Demonstrates little awareness of group process issues.
- ☐ Often strongly states opinions with little attempt to draw upon the ideas of others.
- ☐ May make a point and then withdraw.
- ☐ Uses influence strategies ineffectively.
- ☐ Group members react to influence efforts with hostility.
- ☐ Shows little or no enthusiasm for the task or the group.
- ☐ Demonstrates little or no awareness of cultural diversity in efforts to influence others.

Teamwork Competency

TEAMWORK: The ability to work effectively with others.

The following are some of the behaviors that can be observed when an individual is highly effective as a participant in the work of his or her team:

- ☐ Helps team member's address and resolve issues together.
- ☐ Treats team members with respect.
- ☐ Works collaboratively with others.
- ☐ Shows concern about maintaining or enhancing team spirit.
- ☐ Displays sensitivity to the needs of the group as much or more than to her or his own needs.
- ☐ Frequently considers the implications of decisions on the team.
- ☐ Demonstrates an awareness of cultural diversity when working collaboratively with others.

The following are some of the behaviors that can be observed when a team member is moderately effective as a participant in the work of his or her team:

- ☐ Generally tries to promote a team feeling.
- ☐ Usually treats people with respect.
- ☐ Focuses sometimes on the group's needs and sometimes on her or his own.
- ☐ Generally considers the implications of decisions on the team.

The following are some of the behaviors that can be observed when a team member is not effectively participating in the work of his or her team:

- ☐ Rarely shows any concern about the team or its members.
- ☐ Rarely works effectively in collaboration with others.
- ☐ Doesn't encourage or help team member's address and resolve problems.
- ☐ Doesn't show respect to others.
- ☐ Does not consider the implications of decisions on the team.
- ☐ Behaves in a fashion that encourages divisiveness among team members.
- ☐ Demonstrates little awareness of the impact of cultural diversity when working with others.

Decision Making Competency

DECISION MAKING: **The ability to analyze problems and to decide on an appropriate course of action in a timely fashion.**

The following are some of the behaviors that can be observed when an individual is involved in a highly effective decision making process:

- ___ Gathers and uses appropriate information before taking action.
- ___ Weighs the advantages and disadvantages of several options before deciding.
- ___ Makes decisions that support the needs of individuals and groups.
- ___ Shows an understanding of the need to make decisions based on facts.
- ___ Works to gain acceptance of others involved in the decision or its impact.
- ___ Considers ethical issues before deciding.
- ___ Typically considers the impact of cultural diversity before deciding.

The following are some of the behaviors that can be observed when an individual is involved in a moderately effective decision making process:

- ___ Generally considers appropriate information before taking action.
- ___ Usually weighs courses of action.
- ___ Shows some understanding of the need to make decisions based on facts.
- ___ Shows some awareness of the need to address the impact of a decision on those involved.
- ___ Shows some concern about ethical issues before deciding.
- ___ Occasionally raises concerns about the impact of cultural diversity before deciding.

The following are some of the behaviors that can be observed when an individual is involved in an ineffective decision making process:

- ___ Makes decisions without gathering the necessary information.
- ___ Doesn't weigh the consequences of decisions.
- ___ Rarely considers how decisions will impact individuals and groups.
- ___ Does not consider the ethical implications of decisions.
- ___ Does not considers the impact of cultural diversity before deciding, even when such issues are relevant.

Listening Competency

LISTENING SKILL: **The ability to focus on and understand what is being said, in individual or group situations.**

The following are some of the behaviors that can be observed when an individual is listening in a highly effective manner:

- ☐ Demonstrates good listening skills by clarifying, restating, summarizing important points or issues made by others.
- ☐ Makes good eye contact, nodding to indicate understanding.
- ☐ Follows up on another's conversation as opposed to abruptly changing topic.
- ☐ Reflects on what others have said.
- ☐ Rarely cuts others off while they are speaking.
- ☐ Demonstrates an awareness of cultural diversity when attempting to understand the communications of others.

The following are some of the behaviors that can be observed when an individual is listening in a moderately effective manner:

- ☐ Generally listens to others, but may cut others off to interject their own thoughts.
- ☐ Occasionally asks follow up questions, clarifies, restates, and summarizes.
- ☐ Makes some eye contact.
- ☐ Does not usually change the subject inappropriately.

The following are some of the behaviors that can be observed when an individual is listening in an ineffective manner:

- ☐ Does not allow others to finish sentences. Often interrupts.
- ☐ Seldom clarifies, restates, or summarizes input from others.
- ☐ Often changes topic.
- ☐ Shows interest in only own ideas and suggestions.
- ☐ Seldom nods or demonstrates good eye contact.
- ☐ Does not demonstrates an awareness of cultural diversity when attempting to understand the communications of others.

Oral Communications Competency

ORAL COMMUNICATIONS: **Effectiveness of expression in individual or group situations.**

The following are some of the behaviors that can be observed when an individual is engaging in highly effective oral communications:

- ___ Clear and concise expression of thoughts.
- ___ Articulate, correct use of language, expressive.
- ___ Makes good eye contact with others while speaking.
- ___ Well organized presentation of thoughts.
- ___ Consistently holds the attention of others.
- ___ Demonstrates an awareness of cultural diversity when presenting ideas to others.

The following are some of the behaviors that can be observed when an individual is engaging in moderately effective oral communications:

- ___ Generally gets points across although not necessarily smoothly.
- ___ Holds some eye contact.
- ___ Generally uses language correctly, moderately expressive.
- ___ Thoughts are fairly well tied together and presented.
- ___ Able to get the attention of others on occasion.

The following are some of the behaviors that can be observed when an individual is displaying ineffective oral communications:

- ___ Has difficulty getting point across to others.
- ___ May ramble, talk around the point, or get "lost".
- ___ May switch topics without rationale.
- ___ Frequently uses "ah's".
- ___ Demonstrates low frequency of eye contact.
- ___ May appear to be unsure of what he or she is trying to say.
- ___ Unable to get the attention of others in most instances.
- ___ Does not demonstrate an awareness of cultural diversity when presenting ideas to others.

Ethics Competency

Ethics: Statement*Ethics Statements*

- ___ Clear and concise expression of thoughts.
- ___ Articulate, correct use of language, expressive.
- ___ Makes good eye contact with others while speaking.
- ___ Well organized presentation of thoughts.
- ___ Consistently holds the attention of others.
- ___ Demonstrates an awareness of cultural diversity when presenting ideas to others.

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- ___ Generally gets points across although not necessarily smoothly.
- ___ Holds some eye contact.
- ___ Generally uses language correctly, moderately expressive.
- ___ Thoughts are fairly well tied together and presented.
- ___ Able to get the attention of others on occasion.

Ethics Statements

- ___ Has difficulty getting point across to others.
- ___ May ramble, talk around the point, or get "lost".
- ___ May switch topics without rationale.
- ___ Frequently uses "ah's".
- ___ Demonstrates low frequency of eye contact.
- ___ May appear to be unsure of what he or she is trying to say.
- ___ Unable to get the attention of others in most instances.
- ___ Does not demonstrates an awareness of cultural diversity when presenting ideas to others.