Queen Mary University of London

School of Mathematical Sciences

Placement Module Guide (MTH5200 Mathematical and Actuarial Work Experience) 2023-24

Contents

1.0 Introduction

Congratulations on securing a work placement. All of the effort you put into writing applications and attending interviews has paid off and you can now look forward to an exciting year ahead!

Although you remain registered as a student at QM for the duration of the placement year, you are, first and foremost, an employee and subject to the same terms and conditions as any other employee in the organisation. You will have a line manager or immediate work supervisor, to whom you will be responsible and, any work-related support or training required should be provided by the employer. In the event that you have issues you feel you cannot discuss with your manager then please contact the QM Placements Team via maths@qmul.ac.uk or 020 7882 5440.

Remember that you will be a representative of Queen Mary University and of the School of Mathematical Sciences, and that you are expected to behave in a professional way.

You will be expected to:

- Take full advantage of the learning opportunities which the placement offers;
- Carry out the assigned tasks allocated by your work supervisor;
- Follow the instructions and guidance of the workplace supervisor;
- Follow the official rules and regulations as any other employee of the company;
- Adhere to the company's pledge of confidentiality and to commercial sensitivity;
- Adhere to the organisation's Health and Safety guidelines;
- Behave professionally and appropriately at all times;
- Take responsibility for your own learning and behaviour while in the workplace;
- Complete the required components of the University assessment by the given deadline.

Students must ensure that they keep the QM Placements Team informed of any change in circumstances while out on placement, including change of contact details.

2.0 University contact

Name	Email	Telephone
Simon Rawstron Education Services Manager School of Mathematical Sciences Queen Mary University of London Mile End Road London E1 4NS	s.rawstron@qmul.ac.uk	+44 (0)207 882 5219

3.0 Placement meetings between QMUL, student's line manager and student

Placement meetings typically take place a few months into the placement. The meetings usually take the form of a discussion between a QMUL staff and the student's line manager followed by a discussion between the same QMUL staff and the student.

The purpose of the meetings is to:

- Discuss the progress of the placement both with the line manager and the student; in the event that a student raises any workplace concerns with the QMUL staff, these may be raised with the line manager during the meeting. However, students are encouraged to see themselves as full employees while on placement and will be encouraged to address any queries directly with their line manager.
- Deal with any academic queries a student has;
- Talk through the Learning Objectives Assessment (see Appendices 1 - 3) with the employer and the student;
- Discuss the possibility of further placements with the employer.

4.0 Assessment overview

Students are assessed for their placement year through the following assessment components:

- A learning journal (10%) – the learning journal is ongoing and should be completed at regular intervals throughout the duration of the placement (once a week is recommended);
- A learning objectives task with employer input and feedback (20%);
- A report (60%);
- A presentation (10%).

Students **must get at least 40% (in total) to pass the module**.

5.0 Assessment deadlines

There are four assessment components and some assessment components may have more than one item to submit:

- For the learning objectives task, there are three items to submit:
    - Identifying learning objectives – to be submitted on QMPlus.
    - Learning objectives review 1 – to be submitted on QMPlus.
    - Learning objectives review 2 – to be submitted on QMPlus.
- For the report, there are two items to submit:
    - The draft report – to be submitted to your line manager for clearance around workplace confidentiality.
    - The final report – after your line manager has cleared your draft report for workplace confidentiality, your final report is to be submitted on QMPlus.

Assessment component > Item to submit	Deadline	Notes
LEARNING OBJECTIVES TASK > IDENTIFYING LEARNING OBJECTIVES	Submitted around the 4-week point of your placement.	This is compulsory but not assessed.
LEARNING OBJECTIVES TASK > LEARNING OBJECTIVES REVIEW 1	This is completed at approximately the 4-month stage of your placement.	Depending on your placement start date, you might have different deadlines.
LEARNING OBJECTIVES TASK > LEARNING OBJECTIVES REVIEW 2	Submitted on or before the deadline for the final report and learning journal – see below	
REPORT > DRAFT REPORT TO EMPLOYER	At least 4 weeks in advance of the final deadline – make sure that you allow plenty of time for this so that your final submission is not delayed!	
REPORT > FINAL REPORT TO QM	Saturday 4th May 2024	
LEARNING JOURNAL	Saturday 4th May 2024	
PRESENTATIONS	Saturday 4th May 2024	

5.1 Late submission penalties

- For every period of 24 hours or part thereof that an assignment is overdue there would be deduction of five per cent of the total marks available (i.e. five marks for an assessment marked out of 100).
- After seven days the mark would be reduced to zero, and recorded as a failure 0FL (zero, fail, late).
- A late work penalty would be removed where a student provided good reason for the late submission under the extenuating circumstances policy.
- Schools and institutes are also able to grant extensions to submission deadlines, provided that the extension date was in advance of the relevant subject examination board.

6.0 Assessment guidelines

6.1 Learning journal guidelines

As part of the assessment, you are required to keep a learning journal. The learning journal will count as 10% of your overall mark.

The purpose of your learning journal is to:

- Help you keep track of your progress while you are on placement
- Serve as a reminder of what you've achieved and what challenges you have overcome
- Help you to identify strengths and weaknesses and areas for development
- Assist you with writing your placement report and describing your professional and personal development

For a learning journal to be useful, it needs to be updated regularly. You should start your journal within the first two weeks of your placement and keep it updated until a week or so before the report deadline.

- **In the first 3 months of the placement please keep your journal on a weekly basis**
- **After 3 months you can continue to write it weekly if you wish to or you can change to writing it every two weeks**

When you come to write your journal entries, it may help to ask yourself some of the following questions:

- What work tasks or work-related activities did you undertake or take part in this week. These might include: independent work tasks, attendance at meetings, client liaison, and so on.
- What have you done this week to meet the Learning Objectives that you have set?
- What do you consider to be your main achievements this week?
- Are there any areas of your performance that you are less pleased about? If so, what might you do to improve these?
- How well are you meeting any targets you have set yourself or been set by your employer?
- What problems or obstacles did you encounter this week and how did you/or how are you planning to, overcome these?
- What was the outcome of the work you have undertaken this week (has there been any impact from what you have done)?
- What feedback have you received from others (from your supervisor, your team, your clients)?
- How have you used this feedback?
- Have there been any opportunities to apply the learning from your degree to your workplace? If so, how?
- What would you say are the key things you have learned this week (these could be specific skills; an insight into your personal strengths or weaknesses; about working with others; about the business itself, and so on)?
- Is there anything you would do differently if you were to do it again? If so, what and how?
- Has something that you learned in a previous week had an impact on how you approached a task/situation this week? How?
- Is there anything that you've learned from this week that you would like to follow up in the coming week?

When completing your journal please include the dates that the entry refers to. For periods when you are away from work, just indicate this under the dates.

The length of each journal entry is likely to vary throughout the year as you will probably find you have more to write about in some weeks than others, especially at the start of the year. There is no word limit for a journal entry, but as a guideline an entry with fewer than 200 words will probably be too short and anything more than an A4 page will be too long. What is most important is that each entry addresses the marking criteria (Appendix 5) and is *reflective* rather than simply descriptive.

Three example journal entries:

Student 1

At the beginning of the week we had a reoccurring issue with one of the main clients which occurred just before I came to work. Once I knew the error was the same, I went ahead and informed them straight away of the details we had found so far. Therefore, I was managing client liaison and what the next steps forward were, whilst my team informed me that this was in fact an issue on their side rather than ours. This is working towards my objective of being proactive and tackling cases without hesitation. Then Tuesday came *around and oh boy that day was fun from start to finish. It was employee appreciation day and the Covent Garden office had booked out a ping pong night including pizza and drinks! This by far was the best night of the week. I made new friends within our office, people I don't usually speak to who are actually quite fun! It definitely helped to break down barriers and at this point I feel like I know almost everyone practically. Again, this contributes to my networking objective. I got to know our Head of Engineering a lot better (Sunil) who will help me work on some SQL deployments. The opportunities right now are really reeling in and I am putting myself out there and making the effort I need to make to get to where I need to be. So my SQL skills will definitely improve. Wednesday was a boring day obviously mid-week you really do feel the stretch of the working day! Nevertheless, I kept myself entertained. The main thing I have learnt this week is that networking is KEY! It reinforces what I said previously about being allowed to work with implementation – this is due to me putting the effort in. if you don't ask you don't get! Anyway Pat, who also graduated from QM is helping me set up Node JS on my mac so I will bring that in next week and get coding! I am definitely meeting my technical and people objectives that I had set.*

Student 2

This week I had a chance to sit down with my line manager and set targets for my internship. It was good to get some initial feedback on my performance so far and gain an overview of projects I'll have the chance to work on top of the general day-to-day responsibilities. Delphine was very positive about my progress so far and had constructive advice for improving going forwards. She said I've been picking things up very quickly and she'd been really impressed with the work I'd done so far and my ability to keep calm under pressure. It was really reassuring to hear as I'd felt a bit like I'd been drowning somewhat in the workload so far and hadn't had a chance to prove my capability. It was also interesting to hear that she thought I appeared calm as the last few weeks have been some of the most stressed I've ever felt! In terms of areas for improvement she emphasised that it was important for me to learn the art of shouting about my achievements which she said is key to succeeding at L'Oréal. Whilst she sees that I really like to sit and quietly get on with my work, it doesn't necessarily mean that others will realise this. It's not something that comes naturally to me, as I'm more comfortable letting my work speak for itself, but it is something Delphine says she's more than happy to help push me to do. It's a necessary task if I want to apply for the graduate scheme especially as it requires being endorsed by a manager outside of the team, and so exposure of the work I'm doing is key in getting people outside of the team to notice my achievements and work ethic.

Student 3

I spent the whole of this week communicating with the TRIPLE development team. I was given the objective of finding out the main procedures that are used in the system. This task required me to analyse and understand the different sorts of procedures and tables that are located within the TRIPLE database environment. I managed to complete two out of the five procedures I was asked to analyse. By doing this task I have developed a basic understanding of several financial terms grasping concepts such as front/back office books and cost centres which are where the costs and credits of a book are logged. Regrettably I feel as if I am of not much use as the majority of the tasks require an in-depth understanding of finance terminology. I feel as if I will need to develop my finance and business knowledge much further if I am to be truly useful to [the company]. Additionally, I have come to learn the schema of Book Mapping Service contained within TRIPLE. I now know how each table is merged with another to develop a master table. This master table is then used to identify rouge trades. I have struggled in meeting the deadline I had set myself to hand in this document to my manager. Luckily, the deadline is not strict and the document's purpose is essentially for me to understand the system and learn what it is about. I hope to set myself achievable deadlines in the future so that I can avoid being in this situation again.

6.2 Learning objectives guidelines

You are required to identify learning opportunities and related objectives to work on for the coming year, as part of your assessment. These objectives will need to be directly related to your work and agreed in advance with your line manager. This component is worth 20% of your overall mark for the year.

Your objectives should be drawn from the following categories:

1. **Technical skills**
2. **Working with others (teamwork, interpersonal and communication)**
3. **Self-management (organisational skills, planning and time management)**
4. **Commercial awareness**
5. **Personal and professional development**

These particular categories have been selected as they represent some of the key competencies and qualities that a graduate employer is looking for in their employees. They also tie in with the attributes the University would expect you to have developed as a graduate of Queen Mary.

The opportunities available to you for developing these areas within the workplace will vary depending on your role and your organisation. However, it is likely that for some of you the learning categories included here will align closely with the existing training/appraisal system in place at your organisation and there may be some crossover between what we are asking and what your employer expects of you. If you do find that this is the case, then it is perfectly okay to include similar examples in both contexts.

Learning Objectives Assessment Process

1. **Identifying Your Learning Objectives (Appendix 1)**
   - **i)** Once you are settled into your role and have a better understanding of what your work responsibilities are you should start thinking about your learning objectives. You should also have informed your manager that you have a learning objectives assignment to complete, within the first few weeks of the placement. The university contact is also available by phone or email to discuss this process with you.
   - **ii)** Around the 4-week point in your placement, you should arrange a meeting with your manager to discuss and formally agree your learning objectives for the first part of the year. A date for your first review meeting should also be agreed in the same meeting. The agreed objectives should be signed off by your line manager and yourself.
   - **iii)** A copy of the completed and signed *Identifying your Learning Objectives* document should be submitted through QMPlus (this is for information only and does not form part of the assessment). A copy should also be given to your manager.
2. **Progress Review 1 (Appendix 2)**
   - **i)** You will need to arrange another formal meeting with your manager to review your progress, approximately 12 weeks from the date of setting your objectives. You should complete the relevant sections of the Progress Review form summarizing your progress to date, before the meeting. The meeting with your manager should be used to discuss this in more detail and your manager is required to complete section 3 of the form.
   - **ii)** A section is provided for you to write up any actions that you need to address for the coming months and any new or amended goals. Again, both your manager and you should

sign the completed form.

iii) The completed and signed review form should be submitted through QMPlus. A signed copy should also be given to your manager.

3. Progress Review 2 (Appendix 3)

i) The second review will follow a similar procedure to the first review and should take place approximately one month before the submission date for the assessment.

ii) The completed and signed review form should be submitted through QMPlus. A signed copy should also be given to your manager.

Please note: It is your responsibility to set up meetings with your manager to discuss the learning objectives and to ensure that this part of the assessment is completed.

For details of how the Reviews are graded see **Appendix 4.**

Learning Categories – Behavioural Descriptors

The following descriptors give an indication of the types of skills and behaviours that a placement student should be able to demonstrate through the work they undertake in each of the five learning categories. We recognise that not all of these may apply to your own job and that some may be more important in your role than others. You can use these descriptors as guidelines for measuring your own development throughout the placement year.

1. **Technical Skills**

- Develops a level of technical 'expertise' appropriate to the role
- Is able to explain technical information/problems to different audiences
- Identifies, researches and learns new technical skills independently
- Applies and adapts existing knowledge to the needs of the role
- Is able to evaluate and document technical issues according to user requirements
- Gains a working knowledge and critical understanding of the methodologies and processes associated with developing, implementing or maintaining technology solutions

2. **Working with others (teamwork, interpersonal skills, communication)**

- Demonstrates and maintains co-operative and helpful relationships with others
- Communicates effectively both in writing and in person using a variety of different methods and adapts approach according to the situation
- Is willing to seek help from supervisors/colleagues as required
- Shows flexibility and supports colleagues when appropriate
- Understands the importance of effective listening and appreciates the opinions and viewpoint of others
- Understands the impact that their own behaviour has on others and behaves appropriately
- Builds and maintains professional relationships with clients adapting approach accordingly

3. **Self- management (organisational skills, planning, time-management)**

- Plans and prioritises workload taking into consideration the wider business/team needs
- Establishes and manages deadlines effectively
- Organises time and uses resources effectively to meet objectives
- Sets realistic and achievable targets
- Takes ownership of work and makes independent decisions
- Is flexible and responsive to change

4. **Commercial Awareness**

- Acquires a good understanding of the organisation's aims and objectives and applies these to their work
- Demonstrates an understanding of business processes, why they are undertaken and how technology contributes to this
- Recognises the implications of their individual actions on the wider business
- Recognises the importance of building and maintaining strong relationships with clients/customers
- Demonstrates an understanding of the wider market in which the organisation operates

5. **Personal and professional development**

- Takes a proactive approach to learning; identifying training needs and undertaking new learning opportunities
- Takes ownership of and manages professional development
- Shows commitment to continuing professional development and enhancing employability
- Sets high standards for personal performance
- Maintains professional integrity at all times
- Accepts feedback and responds appropriately and professionally

The university contact will discuss the objectives exercise with your employer during the placement visits to ensure that they fully understand what they are being asked to do and are aware of how their feedback will be used in the assessment process.

6.3 Report guidelines

1) Submission

- **You must submit your draft report to your line manager for clearance around workplace confidentiality.**
- **After your line manager has cleared your report for workplace confidentiality, you then submit your final report on QMPlus.**

2) Word count and penalties for exceeding word limit

- **<u>The placement report should be maximum 2000 words in length, excluding items such as front page, acknowledgements, table of contents, bibliography and appendices (if included).</u>**

- **Reports that fall outside this word count limit will be penalised as follows:**

For every 100 words or part thereof that an assignment is over the word limit, there would be deduction of five per cent of the total marks available (i.e. five marks for an assessment marked out of 100).

- **Your front page should state your word count excluding front page, acknowledgements, table of contents, bibliography and appendices (if included).**

- **We encourage you to take this as an opportunity to practise writing a succinct report; this is a prized skill at workplace.**

3) Content

In the report, you should:

- Provide an introduction to the organisation including a description of the organisational structure and the nature of its business (services, products and clients) and its position in the relevant market sector.
  NB: Please ensure that any information (in text or non- textual form) included about the company, is properly referenced.
- Describe what the purpose of your role is and where it fits within your specific team and the organisation as a whole
- Describe the main tasks/projects that you have been involved in, identifying where you have applied knowledge from your degree course to your work where appropriate
  - Knowledge from your course is not limited simply to hard technical skills such as programming languages or applications you have used. It can also include broader skill areas and approaches such as: problem solving; analysis; project methodologies; documentation; teamwork and time-management
- Evaluate the main problems (these can be related to your technical or personal development) that you have encountered and how they were overcome

- Reflect upon and evaluate the skills/competencies (technical and other) you have developed or newly acquired during the placement.
- Conclude the report by summing up your time in the organisation

4) Basic Formatting for the report

A good report is precise and succinct, and reading it should be both interesting and informative. A clear, concise style of writing and well-presented diagrams and graphs all make for a successful reporting format.

Things to consider:

(a) The author should plan and write the report with the reader's needs in mind. The author should consider who the report is for and what the reader knows about the subject. (It is usually best to assume that they know very little about what you have been doing).
(b) The report should be structured and organised in a logical manner to aid the marker.
(c) The writing style should be formal, fluent and concise.
(d) Care should be taken with the preparation and positioning of non-textual material like tables and charts.
(e) Before submission, a report should be thoroughly checked for accuracy, consistency, spelling and punctuation errors.

5) Appendices

An appendix (or appendices), should be used as a device for removing from the main text all information that is not essential to ensure its flow and understanding. Remember that conciseness is important; if the main text is not cluttered by detailed statistics, data tables, explanations of technical terms and the like, it will be as readable as the material allows.

6) Basic structure – sections and subsections

The main text will usually be comprised of sections rather than chapters. Section headings should be as concise and specific as possible. For this reason, each section should be clearly identifiable and its sub-sections easily recognised. The report should include the following sections:

- Front page
- Acknowledgements
- Table of Contents
- Introduction
- Main body (this should include separate sections relating to the content requirements outlined in 3)
- Conclusion
- References/Bibliography
- Appendices (if included)

7) References

If reference is made to other sources of information this must be acknowledged, otherwise you may risk being accused of plagiarism. This includes information taken from an organisation's marketing and promotional materials and/or its website. In a technical report the Harvard system of referencing is commonly used. We are also happy for you to use other system of referencing, for example, APA.

8) Writing the report

The style should be formal and the English clear and concise. 'Formal' means writing in full (e.g. "it is", rather than "it's"), avoiding slang and colloquialisms and using words correctly. Formal writing is more ordered and 'considered' than speech, but it does not have to be full of long words.

Usually a report is written in an impersonal style, thereby avoiding over use of the first person, 'I' and 'we'.

However, as the report includes personal reflection the use of the first person is perfectly acceptable in this context. Nevertheless, it should still be written formally and presented professionally and it should not read like an extension to your learning journal (which is a much more informal document).

9) Checking

The first draft is likely to be flawed, and a significant amount of revision and re-writing will probably be required. This process can be time consuming. Even when the text is considered to be satisfactory, meticulous checking of detail will be necessary - spelling, grammar, punctuation, typing errors and so on.

10) Diagrams

Diagrams (tables, graphs, charts, line drawings, or any other non-textual material) form an essential part of many technical reports. There is much truth in the saying 'A picture is worth 10,000 words'! The guiding principle here can be remembered as the 'four Rs rule':

The **R**ight diagram with the **R**ight labels should be in the **R**ight place for the **R**eader.

The marker should not need to search for a diagram; it should be signposted clearly and in the right place.

(a) Tables

A table is the most common form of diagram in a technical report. Tables can provide a great deal of information and care should be taken to present them effectively.

(b) Graphs and Charts

Graphs and charts are used to illustrate trends, relationships between variables or to enable comparisons to be made. Computer graphics packages facilitate experimentation to determine, for a particular type of chart, the most appropriate format to use. Care should be taken with the positioning of labels, titles, legend detail and diagram reference numbers. We recommend using a sensible method of numbering, for example, using the decimal system in which, as an illustration, Figure 2.3 would identify the 3rdd diagram in section 2 of the report. References in the main text to diagrams should indicate, if necessary, the page number or appendix where the diagram is located.

11) Finishing the report (the final points to be added)

(a) The Contents page

Even in a short report, there should be a contents page. This should list the numbered sections of the report with corresponding page numbers.

(b) Appearance

The marker will form an initial impression of the report just by skimming through it. Spelling, punctuation and layout will be considered in the marking process.

Aim for a professional presentation and avoid for example: Poor structure, pages in the wrong order (or even unnumbered), pages missing, narrow margins, too small or too large a font size, unusual font style, overcrowded pages, inappropriate line spacing.

The front page should contain:

- the title
- author's name
- student number
- date
- classification (e.g. confidential) if appropriate
- degree title
- word count excluding front page, table of contents, bibliography and appendices (if any).

6.4 Presentation guidelines

When preparing for your video presentation, the following guidelines for oral presentation could be useful and so please feel free to adapt and adjust to your video presentation.

1) Submission outline

You will be required to do a **5-minute video presentation, submitted via QMPlus**.

2) Presentation topic

The presentation should focus on the following areas:

1. What are the **top three lessons** you will be taking away with you from your placement year?
2. Discuss the impact your placement has had on:
   - your plans for and approach to your final year of studies (this should include course

related planning and ideas as well as any personal aims)
- your career plans and aspirations

3) Tips for delivering a good presentation

(a) Content:

- Make sure all aspects of the topic are addressed;
- You should introduce yourself, your company and your role but do not waste time going into a lot of detail as we already have this information in the report. Instead, focus on the questions we have asked above and keep any description of your role and company to a bare minimum (2 minutes at most);
- Spend some time thinking about the 'lessons' you have learned over the year and why these are significant to you. We are not looking for a list of skills here but some insight into your professional and personal development. Some examples students have talked about in the past include:

    - "I have learned the real value of teamwork"
    - "I have learned that I am more technical than I thought I was"
    - "It is okay to not know everything"
    - "It is okay to ask questions"
    - "Understanding technical concepts is more important than simply knowing how to code"
    - "I love working with clients"
    - "Picking up the phone really helps!"

(b) Structure

- Keep within the time limit – presentations that go over or under the time limit by more than 2 minutes either way may lose marks;
- Your presentation should have a clear structure and include an introduction, a main body and a conclusion;
- If you are using presentation software make sure that the content (text, pictures and graphics) is clearly presented and supports what you are saying;

(c) Delivery

- Pace yourself – try not to rush through the content. It is okay to pause during a presentation;
- Audibility - the audience needs to be able to hear you so think about your tone and make sure you speak clearly;
- Body language – make eye contact with the audience and avoid turning your back on them. Be conscious of your posture. It is okay to move around and to use your hands when talking but don't fold your arms or fiddle with a pen or other 'props' as this is distracting;
- Professionalism - remember that you are being assessed. Plan your presentation in advance and consider the impression you are making;
- There is no dress code for the presentation;
- And finally – PRACTICE, PRACTICE, PRACTICE! The more you do this the more confident you will be. It is usually obvious to an audience when someone has not prepared well for a presentation so do not end up being that person!

APPENDIX 1: Identifying your Learning Objectives - EXAMPLE

This exercise should be carried out about four weeks into your placement. The purpose of this exercise is for you to identify some key learning opportunities related to your job and to set yourself objectives to achieve these. It is essential that you agree these objectives with your line manager. These objectives will cover the first part of your placement leading up to the first progress review.

Learning Categories	**Learning Objectives*** What do I want to be able to do or improve?	**Opportunities** Where in the company/your role are the opportunities to do this?
Technical Skills	• Improve SQL skills • Improve XML skills • Improve HTML and Java Script programming	• Working on incoming support tickets that are KRS related e.g. Blue Bay and Edinburgh Partners • Working with the implementation team on small tasks progressing onto larger issues
Working with Others	• Daily communication with the team in Reno/India and departments such as Infrastructure and Implementation • Daily communication with clients, prioritizing high networth clients	• Daily support call/chat with India/Reno and request updates from Infra/Implementation • Frequent communication via email to clients to keep them informed of the status of the case. To initiate phone calls if a case becomes urgent or the client needs to be notified immediately.
Self -Management	• Prioritise urgent cases that require immediate attention • Keep up to date on all cases • To be proactive in picking up new cases	• Allocate cases to the correct individual and request frequent status updates. • Keeping a daily log of all cases • Attempt at fixing an issue with a new case and consult with my manager when in doubt
Commercial Awareness	• To gain an understanding of what asset management is • To gain an understanding of the tools and products we offer • Understand the different roles in the company and what their responsibilities are	• Gaining an insight from colleagues and carrying out research in my spare time • Communicating with the product team/business analysts and colleagues to understand the products we offer • Communicating with individuals in different teams
Personal and professional development	• To encourage myself in terms of learning new skills and scoping out new opportunities • Network with different people in the company • Make improvements based on constructive criticism	• Make an attempt to tackle new cases and learn about what opportunities I can take on • Connect via LinkedIn, ask about their career journey and what they enjoy about working for the company. • Take on board the feedback given by my manager and reflect to see what I need to work on further.

NB: You should aim for approximately 10 objectives overall and you must include at least 1 in each of the 5 categories.

PLACEMENT START DATE:
AGREED DATE FOR 1ST REVIEW MEETING (approx. 16 weeks from placement start date):

Student Name	**Student signature**	**Supervisor signature**	**Date**

<u>APPENDIX 2: Placement Year Learning Objectives – Progress Review 1 - EXAMPLE</u>

This exercise should be carried out approximately 16 weeks into your placement. You should complete parts 1 and 2 independently and then discuss this with your line manager. Your line manager should complete part 3 giving one tick per category. Part 4 should be completed by you after discussion with your manager. Both you and your manager need to sign the document.

Learning Categories	**1. Learning Objectives** Taken from Exercise 1	**2. Evidence of progress to date** What have you been doing?	**3. Line Manager to complete** **(Tick as appropriate – one tick per category)**		
			Does not meet expectations	Meets expectations	Exceeds expectations
Technical Skills	• Improve SQL skills • Improve XML skills • Improve HTML and Java Script programming	• Working on incoming support tickets that are KRS related e.g. Blue Bay • Learning SQL with Steve and completing weekly homework/tasks			x
Working with Others	• Daily communication with the team in Reno/India and departments such as Infrastructure and Implementation • Daily communication with clients, prioritizing high net worth clients	• Daily support call/chat with India and constant communication with Indian colleagues • Frequent communication via email to clients to keep them informed of the status of the case. • Communicating with Ram on certain cases to gain a deeper understanding • Asking advice from other people			x
Self-Management	• Prioritize urgent cases that require immediate attention • Keep up to date on all cases • To be proactive in picking up new cases	• Label the cases as critical or urgent and approach someone to look into it immediately if possible • Raising urgent cases to Theo • Assigning myself new cases and working on them, asking for help if needed		X	
Commercial Awareness	• To gain an understanding of what asset management is • To gain an understanding of the tools and products we offer • Understand the different roles in the company and what their responsibilities are	• Gaining an insight from colleagues • Communicating with individuals in different teams		x	
Personal and professional development	• To encourage myself in terms of learning new skills and scoping out new opportunities • Network with different people in the company • Make improvements based on constructive criticism	• Tackling new cases • Take on board the feedback given by my manager and reflect to see what I need to work on further. • Listening carefully to instructions			x

4. Use this space to record any action points arising from the review meeting and any new or amended goals that you will be taking forward for the next review period.

	Action points/goals
Technical Skills	• Improve SQL skills to an advanced level • Improve HTML and Java Script programming to an advanced level
Working with others	• Daily communication with the team in Reno/India and departments such as Infrastructure and Implementation
Self-management	• Attention to detail • Proof-reading documents
Commercial Awareness	• To gain an understanding of what asset management is • To gain an understanding of the tools and products we offer
Personal and professional development	• To encourage myself in terms of learning new skills and scoping out new opportunities • Take on board improvements

PLACEMENT START DATE:
AGREED DATE FOR 2ND REVIEW MEETING:

Student Name	**Student signature**	**Supervisor signature**	**Date**

APPENDIX 3: Placement Year Learning Objectives – Progress Review 2 - EXAMPLE

This exercise should be carried out approximately 1 month before your placement report is due. You should complete parts 1 and 2 independently and then discuss this with your line manager. Your line manager should complete part 3 giving one tick per category. Part 4 should be completed by you after discussion with your manager. Both you and your manager need to sign the document.

Learning Categories	**1. Learning Objectives** Taken from Review 1	**2. Evidence of progress to date** What have you been doing?	**3. Line Manager to complete** **(Tick as appropriate – one tick per category)**		
			Does not meet expectations	Meets expectations	Exceeds expectations
Technical Skills	• Improving SQL skills to an advanced level • Improve HTML and Java Script programming to an advanced level	• Working on data maintenance tasks and configuring data and relevant tables, using stored procedures to insert new data *Using TeamCity and Octopus to deploy changes from DEV 210 source control to DEV 210 • Working through the errors posed by the build and reverse engineering to resolve the issue • Creating stored procedures and unit tests using the tSQLt framework and testing the changes • As my knowledge increases, I am being assigned more complex tasks • In the last months of my placement, I will be working with Fabrizio to increase my knowledge of Node JS			x
Working with Others	• Communicating with the support team and other departments • Attention to detail	• Daily support call/chat with India and constant communication with Indian colleagues • Full support handover with Brian and India team • *Working on specific clients and communicating with the relevant department			x
Self-Management	• Working from an assigned task list • Proof-reading documents	• Recording my work and tasks daily in written notes and reviewing at the data scrum every morning • Following up tasks from the previous day • Double checking files and documents before they are sent out			x
Commercial Awareness	• To gain an understanding of what asset management is • To gain an understanding of the tools and products we offer	• Speaking to Greg about how asset management works and what companies are considered as key players • Working on the different products through support tickets such as doc portal, secure portal in specific and communicating how the products work to colleagues			x
Personal and professional development	• To encourage myself in terms of learning new skills and scoping out new opportunities • Take on board improvements	• Request list made to Steve of things I'd like to learn before I leave in July, some are data related and some are focused on other parts of the business • Visiting the data centre in order to understand how the information is stored and the hardware involved • Asking for help when I find an error or I am unable to resolve something • Data mapping and analysis for Sarah and applying business logic where necessary • Note down improvements suggested that can be done to avoid issues in the next round and noting down the process.			x

4. Use this space to record any action points arising from the review meeting and any new or amended goals that you will be taking forward for the final part of your placement.

	Action points/goals
Technical Skills	• Improve Python skills to an advanced level
Working with others	• Presentation skills
Self-management	• Attention to detail • Proof-reading documents
Commercial Awareness	• To gain a better understanding of our clients
Personal and professional development	• To network with others • To take on board feedback from others

PLACEMENT START DATE:

Student Name	**Student signature**	**Supervisor signature**	**Date**

APPENDIX 4: Marking criteria for Learning Objectives Review 1 and Review 2

The two completed review documents are an assessed component of the student's academic work and count as 20% (10% each) of the overall mark for the placement year. The scores are worked out as follows:

- 5 'Exceeds expectations' = 10 (100%)
- Minimum 3 'Exceeds' and rest 'Meets expectations' = 9
- Minimum 2 'Exceeds' and rest 'Meets' = 8
- Minimum 1 'Exceeds' and rest 'Meets' = 7
- 5 'Meets' = 6
- 4 'Meets' and 1 'Does not meet' = 5
- 3 'Meets', rest 'Does not' = 4
- 2 'Meets', rest 'Does not' = 3
- 1 'Meets', rest 'Does not'= 2
- All 'Does not meet' = 0

APPENDIX 5: Marking criteria for Learning Journal

1. Critical ability, reflection and analysis:

- Evidence of analysis, reflection and insight into your personal development during the placement referring to specific skill development and key events
- Evidence of a regular and structured approach to keeping a learning journal
- Evidence of the ability to evaluate own performance and of responding well to feedback
- Evidence of the student seeking out new learning experiences
- Evidence of learning from experiences and progressing over time

APPENDIX 6: Marking criteria for Report

1. Knowledge and understanding of background context:

- A description of the placement organisation, demonstrating an understanding of the organisation's objectives, services, clients and its position in the relevant market sector
- Evidence of understanding of the placement role, and where it fits within the organisational structure

2. Critical ability, reflection and analysis:

- Evidence of the ability to apply knowledge from taught modules to the workplace
- A description of the key tasks/projects undertaken whilst on placement
- An evaluation of the main problems faced and how these were overcome (technical or related to personal development)
- Evidence of the ability to reflect upon and analyse skills newly acquired or developed throughout the placement year (technical and other)

3. Presentation and professionalism:

- Main ideas and sections clearly and logically presented
- Good use of non-textual material (graphs, tables etc.)
- Fluent writing style used with correct grammar, spelling and punctuation
- Use of a writing style appropriate to the content
- Proper use of references where appropriate
- Adheres to word count guidance

APPENDIX 7: Marking criteria for Presentation

1. Knowledge and understanding of background context:

- Evidence of reflection, self-awareness and insight into your personal development during the placement including reference to the influence the experience has had on your approach to your final year studies and future career plans and aspirations

2. Presentation and professionalism:

- Evidence of good preparation
- Well organised and logical structure
- All questions in the topic are addressed
- Appropriate tone
- Keeps within time limit
- Good use of visual aids (if used)
- The ability to handle questions well following the presentation

We are confident that you will have a successful and fulfilling placement year. Enjoy your journey (and writing about it)!