

Syllabus Spring 2010
Accounting 305 – Professional Portfolio Project

Acct 305 1M - Professional Portfolio Project

INSTRUCTOR INFORMATION:

Instructor:	Karen Tabak
Office Location:	ABAC 2210
Work Phone:	314-529-9678
E-Mail Address:	tabak@maryville.edu
Web Page	accweb.itr.maryville.edu/tabak
Fax Number:	314-529-9975

Text: (REQUIRED)

No Text – Must access material on Desire2Learn

PREREQUISITES:

SUCCESSFUL COMPLETION of Acct 211 – Sophomore Standing

Pre-Assignment: Updates and classroom information will be posted on **the course Desire2Learn website.
Read the entire syllabus carefully!**

Session 1 Classroom (you may attend either session)

Wednesday January 20	5:00-6:00 pm	Reid 2300
Friday January 22	11:00-noon	Reid 2309

This syllabus is subject to change at the discretion of the instructor.

Professional Portfolio Project Acct 305

Karen Grossman Tabak, PhD, CPA

ABAC 2210
314-529-9678

Instructor Information:

Scheduling Office hours is done electronically.
See the **course Desire2Learn website for details.**

Office hours

Rd 2210 – appointments after 4:30 should call if the School of Business Door is locked	
Wednesday	2:00 to 6:00
Friday	11:00 to 1:00

To schedule an appointment – see instructions on Desire2Learn
Walk-ins welcome! Please note, students with scheduled appointments receive priority over “walk-in” students.

Course Objective:

1. Understand the skills and competencies expected of those entering the accounting profession
2. Begin the preparation of Professional Portfolio

Course Activities:

Begin the Professional Portfolio Project to be enhanced throughout your academic career and completed in Accounting Theory.

- You will first prepare a grid outlining your competencies.
- Once the grid is prepared, you will prepare an Electronic Portfolio.
- Finally, you will prepare a Summary of Competencies Achieved to explain how you will complete competencies you have not yet achieved (or indicate that you have achieved all of the competencies)

Sample portfolios are available on the course website and others will be presented in class.

Class Meeting Times:

Important Dates	Time	Topic	Location
Wednesday Jan. 20 or Friday Jan 22	5:00-6:00 pm 11:00-noon	Introduction & Explanation & Demonstration Introduction & Explanation & Demonstration	Reid 2300 Reid 2309
Wednesday February 17	6pm	Grid due to drop box	Drop box
Wednesday, March 10	By 6pm	Portfolio Due by 6pm	Drop Box

Important date 1 - Session 1 –

Wednesday Jan. 20 @ 5pm or
Friday Jan 22 @ 11am

You may attend either session – but you must attend one of these sessions

Agenda

- Explanation of the Portfolio Project
- Sample electronic portfolios will be demonstrated
- Questions and discussions
- Details of how to upload your portfolios will be shared
- Note: Late arrivals & early dismissals can be accommodated but you must attend.

Important Date 2 **Wednesday February 17**
Grid due to drop box

Important Date 3 **Wednesday, March 10.**
Portfolios Due in the drop box by 6pm

Accounting 305
Spring 2010

Grading

A	94-100%	C+	78-79.9%
A-	90-93.9%	C	73-77.9%
B+	88-89.9%	C-	70-72.9%
B	83-87.9%	D	60-69.9%
B-	80-82.9%	F	59.9% and below

	Points Available
Grid Due February 17	10
Neatness	10
Bonus – Creativity of Presentation	5
Writing Quality	15
Resume Quality	10
Quality of Explanation for each item included and quality of the explanation of the relationship to Competencies and Demonstrates an Understanding of the AICPA Core Competencies	20
Completeness/Provides appropriate documentation or explanation of Competency and clearly explains the relationship of the document to the elements	25
Summary of Competencies Achieved is properly prepared and included as a separate attachment in your portfolio YOU MUST USE THE FORM PROVIDED NO ALTERNATIVE FORMS MAY BE USED & everyone must complete it! Must be posted to the drop box on Desire 2 Learn separately	10
Total	100

To protect your privacy, all course email communication will be restricted to the Maryville email system. Please check your email regularly for course updates. If you do not have a Maryville email address, contact the Maryville help desk at 529-9506. NO OTHER EMAIL SYSTEMS WILL BE USED.

Academic Accommodations

Maryville University provides accommodations and supports for students with disabilities as defined by the Americans with Disabilities Act. If you have a documented disability and wish to discuss academic accommodations, please contact the course instructor and/or the Director of the Academic Success Center located in the University Library (314-529-6850)

Sample Portfolios on the Course Desire 2 Learn Website and at <http://accweb.itr.maryville.edu/tabak/>

Further Explanation of the Course Assignments:

The Portfolio is designed to be a compilation of your accomplishments here at Maryville University and throughout your educational experiences. For the purposes of this project, we expect you to use the *Framework* and the *Core Competencies* as your guide.

Assignment 1- Complete the Grid

Grid is due in the course drop box – The grid is posted on the Desire 2 Learn course website. (Late penalties are 15 points per day – therefore no late work is accepted)

1. Visit the AICPA web site of the Core Competencies
2. Download and Review the Grid on the course Desire 2 Learn Website
3. Get started: Within each area or section, you should consider a list the elements for each topic or subcategory. See the AICPA web site for the elements included in each competency.
4. Next determine if you possess the competency
5. Find the item that gives evidence of the competency or write a brief narrative detailing the elements you possess or describe the ways in which you can demonstrate the competency **(as you identified in the grid.)**
6. Where you do not possess the competency, list how you intend to achieve that competency before graduation **and prepare a separate listing of these items [see below.]**

The Grid – the Grid is due on **Wednesday February 17** in the drop box. The purpose of the grid is to help you understand the elements that compose each competency. It is the first step in preparing the portfolio. You will find yourself referring back to the grid as you prepare your portfolio. There may be many items that you find you do not possess – this is a journey. Identifying the elements you do have, explaining how you possess them and the items that document that, will make the preparation of your portfolio more efficient. The grid is to be submitted electronically and is worth 10 points.

Note: The grid is difficult and will take you several hours to do. The consensus from past students is that the process of preparing the grid is extremely helpful in ultimately preparing the portfolio.

Quote from student:

I will tell you that the grid was very beneficial. That is the outline I used for the whole thing. Once the grid is thought out then it is just a matter of compiling your thoughts. LOVED THE GRID!

Assignment 2 Complete the Portfolio

- Assemble the items and explain each item based upon the grid
- Where you do not possess the competency, explain it on the Summary of Competencies Achieved form. Remember you are preparing the portfolio for electronic presentation – be aware of that.
- **Explanation:** Each artifact included in your portfolio should be explained. You may explain it in a table of contents for each section, or you may include an introduction before each item. Think in terms of completing the statement: “*This item demonstrates the competency _____ as it shows my ability to _____.*” This should come from the grid.
- **A suggested table of contents is as follows:**

Resume (you may want to make this an exhibit that is in Word)

Functional Competencies

Decision Modeling
Risk Analysis
Measurement
Reporting
Research
Leverage Technology to Develop & Enhance Functional Competencies

Broad Business Perspective Competencies

Strategic/Critical Thinking
Industry/Sector Perspective
International/Global Perspective
Resource Management

Legal/Regulatory Perspective

Marketing/Client Focus

Leverage Technology to Develop & Enhance a Broad Business Perspective

Personal Competencies

Professional Demeanor
Problem Solving and Decision Making
Interaction
Leadership
Communication
Project Management
Leverage Technology to Develop & Enhance Personal Competencies

References (optional)

- **Format: The Portfolio must be completed ELECTRONICLY. You may use Word, PowerPoint or any other method you prefer. Exhibits may be inserted as objects, links or any other method you prefer. Size matters – if the portfolio is too large to upload to Desire2Learn, you may save it in GoogleDoc. Additional details will be provided.**
- **Remember this is electronic – think about how it will look on the screen**
- **Sample electronic portfolio at <http://accweb.itr.maryville.edu/tabak/> and on the course Desire2Learn website.**
- You must insure that your portfolio will open. Try to open your portfolio on another computer from Desire 2 Learn to insure there are no issues with your portfolio. Do not wait until the last minute to submit your portfolio. **(Late penalties are 15 points per day after 6pm)**
- **Note:** Competencies cannot be mastered simply in accounting courses, nor should you limit your experiences and projects to course work. Rather, you should integrate liberal arts courses as well as volunteer work, employment and extra-curricular activities.
- **Any wording “copied” from the AICPA web site must be properly referenced to avoid the accusation of plagiarism.**
- **Due **Wednesday, March 10**. by 6pm (penalties for late submission apply 15points per day)**

Assignment 3 Complete the Summary of Competencies Achieved Form Also Due on **Wednesday, March 10**

Summary of Competencies Achieved - The form attached must be filled out by each student and should be submitted in the drop box. The form is worth 10 points.

NO substitute form is allowed! A version in Word will be posted on Desire 2 Learn.

The Competency form must be posted separately to the Desire2Learn drop box

- **Due **Wednesday, March 10**. by 6pm (penalties for late submission apply 15points per day)**

Assignment 4 – CONTINUE TO UPDATE THE PORTFOLIO

And Turn it in at the end of Accounting Theory

Quotes from students:

I found this course to be very valuable as it made me realize what my strengths and weaknesses are.

Now I am more confident and more prepared for future interviews.

This project was very tough, but I definitely think making this was worth while.

A sample electronic portfolio is available at <http://accweb.itr.maryville.edu/tabak/>

