



# Agency Internship Guide

---

**InVEST**  
127 South Peyton Street  
Alexandria, VA 22314  
(800) 221.7917  
[www.InVESTprogram.org](http://www.InVESTprogram.org)

---

Staffing continues to be a major challenge for independent insurance agencies. Principals regularly point to the difficulty in finding qualified, motivated employees – and to their struggle in drawing those talents to an industry not necessarily known as sexy or exciting. When they do find the “right” person, agents spend significant time and money training those new employees, only to have to repeat the process when things do not work out.

You can break this disappointing cycle through the strategic use of interns. A quality internship program will enable your agency to attract bright, ambitious young people – and identify cheaply and easily those you want to keep for the long term.

Interns tend to stay with the employer with which they intern. If a student is a quality intern, the decision to hire is easy. An internship usually is a student’s first look at the workplace. It can be a springboard to meaningful employment in a field of interest for the student. Agencies and companies alike can sponsor a paid internship. While non-paid internships are possible, strict guidelines apply and agencies should consult legal counsel for these requirements. Remuneration can be worked out with the school and may depend on factors such as age and capabilities. Sponsoring an intern is a commitment and requires planning and follow-through. A well-planned internship can reward your business.

This guide will walk you through the important elements of internships – including issues of compensation, credit, and legal implications – and provide you with a framework for developing your own intern program.

## **Benefits of Internships**

Participation in internships offers a number of advantages for students, employers and the educational institution:

### **For Employers**

- Aid in recruiting and selecting future full-time employees;
- Reduce the cost of recruiting and selecting full-time employees;
- Provide a source of temporary employees;
- Benefit from an injection of new ideas from students and academicians and stay current in a particular field;
- Increase the profile of the organization in the community and at the educational institution;
- Provide an opportunity to influence the structure of a school or college’s curriculum; and
- Experiment with new positions or functions without having to make long term commitments.



## **For Students**

- Opportunity to assess career possibilities;
- Opportunity to preview a future fit with an employer- agency or company;
- Opportunity to develop job-related skills and train under both academic and practitioner supervision;
- Enhance employment opportunities;
- Enrich classroom instruction experience;
- Earn money while possibly earning academic credit; and
- Acquire training in the latest technology.

## **For Academic Institutions**

- Provide a new avenue to assess student and academic quality;
- Provide a new channel for applying management theory;
- Create a source of practitioner input into curriculum development;
- Provide a source of employment opportunities for students;
- Contribute to the recruitment of qualified students;
- Provide exposure to the business community which can lead to increased corporate donations; and
- Deliver education that reduces classroom crowding when space is at a premium.

### **Contact Info.**

National InVEST Office  
127 South Peyton Street  
Alexandria, VA 22314

Phone: (800) 221-7917  
Email: [info@investprogram.org](mailto:info@investprogram.org)  
[www.investprogram.org](http://www.investprogram.org)





## **Types of Internships**

Internships come in many forms. An internship can be merely an external work experience or a carefully planned and monitored work experience in which the intern has intentional learning goals. Internships can be part of the academic institution's curriculum, an individual student's learning plan or simply an individual's desire to explore career opportunities and earn some money while in school.

### ***Internships for Credit***

Internships may or may not carry academic credit. Internships for credit can be expected to come with a greater degree of structure and accountability on the part of the student, institution and employer.

### ***Paid and Unpaid Internships***

While internships can be paid or unpaid, in most cases students do expect to get paid as part of the internship. This will likely attract a better quality candidate pool and enhanced dedication to the internship experience. You are encouraged to contact legal counsel regarding requirements for unpaid internships. Your state association, IIABA, other agencies and your companies can provide guidance on prevailing rates of compensation.



## Implications and Strategies for Insurance Agencies

The first step in considering an internship is to identify the needs of the agency. What the agency wants to gain from such a resource will largely dictate what type of program is most suitable. For instance, if the primary goal is to secure a steady flow of potential permanent candidates, and the agency has the management time to provide adequate mentoring, an internship that is fully developed and structured at a college or university might be appropriate to fully leverage the relationship between the agency and the institution. On the other hand, if the agency is simply in need of temporary help for project-oriented tasks, or lacks sufficient management time to administer a formal program, a college placement service or informal relationship with an academic department might be enough.

### Internship Duration

Internships generally are a one-time experience for the student. They last anywhere from a month to a year, and the typical college internship lasts one semester or a summer. High School internships may last a school year and/or summer.

### Examples of Internships

- An insurance agency rotated students through various departments for 1-2 weeks each. The students were assigned special projects that required their Excel and PowerPoint skills. The students learned from sessions with managers, company meetings, and field visits with marketing reps and claims adjusters. An insurance agency utilized students to assess properties on the agency's books that had not been reviewed recently. Using internet aerial photography and on site surveys and photos, the agency then was able to make better recommendations regarding coverage to the property owners.
- A third party administrator (TPA) had a student conduct a benchmarking survey of the cost of claims for a particular region. The student was able to document the relative cost savings produced by the TPA. The TPA then expanded the survey and the student even produced promotional information that was used nationally.
- A managing general agency trained students to identify missing or questionable information in applications received. In some cases, students were allowed to directly contact agents submitting applications to obtain the needed information.
- An agency assigned a student to help in processing claims. The student identified information that was missing or required clarification for the claims manager.
- An agency had a student work with the marketing manager to handle applications to carriers and to respond to carrier requests for additional information.



## Ideas for duties and internship tasks

Communicate with insureds and prospects

- Personalize template letters and email
- Post to social media
- Initiate auto/home pre-renewal communication

Generate quotes (personal & business) using comparative rater and carrier proprietary systems.

Generate Auto ID Cards & Certificates of Insurance

Prepare Account Proposals

Enter/Update insured data in agency management systems

Poll insureds for preferred means of communication and update agency system

Initiate direct mail or solicitation campaign – cross sell, upsell, new prospects

Launch a special project – one the agency has not been staffed to initiate and complete

Identify other tasks which agency employees suggest, especially those which CSRs and Producers may consider busy work and detract from more productive endeavors.

## Who Do You Want?

Once the needs are identified, a job description must be drafted that includes job duties, as well as qualifications desired: specific major, computer skills, class level, etc. The job description also should include a description of the application procedure, the pay range (if it's a paid internship) and the duration of the internship. The description should also indicate citizenship requirements or if international students are eligible.

## Where Do You Find Interns?

Some colleges have insurance departments or business schools. At others, agencies will have to tap into other academic disciplines to find qualified candidates. A listing of InVEST High School teacher contacts is available from [InVEST's national staff](#). Some fields of study with relevance to agency operations include general business, management, marketing, accounting, finance, advertising/public relations, computer science and communications. Students from these disciplines often have not decided on a professional career and, after some exposure, may find the insurance industry attractive.



The availability of these non-insurance specific disciplines makes an added case for using interns for project-oriented tasks such as marketing initiatives or technology tasks.

Once the agency/company has determined what it hopes to gain from an internship, the next step is to contact institutions in the area about the availability of internship programs. The search should begin the semester before the intern is needed. Institutional offerings run the gamut from simple placement services to highly structured, formal programs. Programs offered within an institution may vary by department. Searching a college's Web site usually will provide an indication of the level of sophistication and identify contacts.

When contacting the institution, it's important that all parties understand the expectations and responsibilities of the program. While not required, a sample internship agreement and evaluation form is included for your reference.

## **Legal Considerations**

Major areas of concern for employers are compensation laws, workers compensation, unemployment insurance, and employment practice laws and liability. Please consult legal counsel if you are unsure.

### ***Compensation***

We encourage paid internships as a positive commitment to the student. While the Fair Labor Standards Act does not require interns to be paid, we encourage you to contact legal counsel regarding requirements for these formally structured programs.

### ***Workers Compensation and Unemployment Insurance***

Whether paid or unpaid, the intern should be covered by workers compensation. Many institutions will require proof of coverage. For unpaid interns, it would be advisable to add a voluntary workers compensation endorsement. Interns are not eligible for unemployment benefits after the internship is over.

### ***Employment Practices Liability and Indemnification Agreements***

In most cases, the institution will require the employer to assume liability for interns. The student also may be accorded additional institutional protections and processes, especially for issues of liability, confidentiality and harassment. Generally, the same EEOC standards that apply to full-time employees will apply to interns. Internship sites must be equal opportunity employers and cannot practice "unlawful discrimination." The



reasonable accommodation provisions of the Americans with Disabilities Act also will apply.

## **Intern Orientation, Mentoring and Evaluation**

In order to maximize the mutual benefit of the work experience, the agency/company should assign a mentor to the intern, preferably a management-level person who is willing to commit the necessary amount of time. This should be someone who likes to teach and is familiar with all aspects of agency/company operations. A proper orientation should be conducted at the outset and followed up with periodic evaluations, both of the intern and by the intern, for continuous improvement. The following pages include sample documents which can be used for managing the process.

### ***Suggested Intern Goals***

- Gain an introduction to core business functions and demonstrates basic understanding. Measurement of success will be completing new hire on-line orientation and receiving a satisfactory score from your supervisor.
- Gain an introduction to department operations and demonstrates understanding of key department functions. Measurement of success will be receiving overview of key department metrics from department manager, job shadows others, and asks relevant questions.
- Communication. Measurement of success will be reviewing projects with supervisor for clarity and direction, keeping supervisor and all others informed of progress toward goals, and writes clearly and persuasively.
- Self-management. Measurement of success will be effectively planning and organizing work, completing projects within agreed time frames, and seeking to master the skills and knowledge of the role.
- Quality of Work. Measurement of success will be completing assignments accurately, working to reflect attention to detail, and producing quality product.
- Teamwork. Measurement of success will be supporting the team in meeting overall department goals.
- Leadership. Measurement of success will be taking ownership for development and pursuing opportunities to gain exposure to different aspects of other functions in the department.
- Customer Service. Measurement of success will be responding to customers in timely professional manner and receiving positive feedback from customers.
- Attendance. Measurement of success will be demonstrating a commitment to the company or agency through reliability.
- Values Diversity. Measurement of success will be treating others with dignity and respect and contributing to a positive work environment.





## Intern Checklist for Employers

- Identify need
- Draft intern job description:
  - Job duties
  - Qualifications desired including major
  - Citizenship requirements, if any
  - Application procedure
  - Compensation rate, if any
  - Duration of internship
- Approve student learning objectives;
- Consult school supervisor regarding problems related to the work experience;
- Appoint mentor
- Recruit intern
- Conduct hiring interview with the student;
- Work with student to coordinate work and school schedules.
- Review legal considerations
  - Review and approve internship agreement
  - Conform to state and federal labor laws;
  - Address workers compensation issues
  - Conduct appropriate employment practices orientation
- Conduct intern orientation and provide safety information
- Sign training agreement;
- Verify and sign attendance and/or time records, as required;
- Conduct periodic evaluations of intern—at least monthly
- Obtain evaluation of intern experience at the end of the internship

## Sample Intern Orientation

### Overview

The depth of orientation may depend on whether or not there is a possibility of making the intern a permanent employee sometime in the future. Obviously, if the intern is being hired for a particular project, some elements of the orientation process could be omitted. Either way, making an honest, positive impression on your intern concerning the industry and the agency business is worthwhile.



- **Introduction to Agency Intern Mentor**
- **Introduction to Staff**

Provide a venue for introducing the intern to agency staff, preferably in small groups. Help prepare the intern to share information about him/herself—academic goals, professional aspirations, what he/she hopes to gain from the experience and from your staff.
- **Overview of Insurance Industry**
  - Read *InVEST Student Textbook*
- **Overview of Agency Operations**
  - Review agency/company history
  - Review vision, mission, values, etc.
  - Describe agency management and ownership
  - Provide overview of organizational structure, organizational chart
  - Describe staff roles, functions, relationships
  - Explain supplier relationships: carriers, vendors
  - Describe community involvement
  - Provide overview of client base
  - Review agency marketing plan, strategic objectives
  - Review employee manual



## Final Evaluation

- Share formal written and face-to-face feedback on performance, skill sets, contribution and other values of the company
  - Did he or she meet/exceed the expectations?
  - Did he or she improve?
  - How well does he or she fit the company?
- Some organizations are prepared to make a full-time offer at the end of the summer to high performing interns. If the employer is not prepared to make a full-time offer, sharing a timeline for a decision is important. If the employer chooses not to extend an offer to the intern, it is helpful to bring closure to the process by providing the reasons why the intern is not being offered a full-time position and, when appropriate, suggestions for improvement.

## Ten Concerns of Interns

Compiled by Michael True, director, Internship Center, Messiah College

1. ***Give us real work!*** It can't be said too many times that interns want to work and learn. An internship can help you get a job done that you couldn't otherwise, right? If you've brought on an intern as a recruitment tool, then how will you be able to assess their abilities? It just makes sense to utilize your interns well.
2. ***Do what you say, and say what you do!*** Be honest with your interns about what they can expect during their internship. If the job will require stuffing envelopes, then make that clear. But if you tell the intern they will be researching a project, and they spend 90% of their time doing "grunt" work, then bad feelings will develop. Honesty doesn't cost you anything, and it will make interns feel that much more respected.
3. ***We like feedback!*** Remember that interns are students, and they may not have the business skills and experiences that you take for granted. If your intern makes an oversight, just pull him or her aside and explain how the situation should be handled in the future.
4. ***We want to be included too!*** Is there a staff meeting they can attend? Can they quietly tag along to that next project meeting? Headed to lunch with a couple of people from the office? Please include them in the daily life of your workplace. After all, if you provide a little more perspective on the intern's work, the product will be that much better.



5. ***Please explain.*** When you assign work, make sure you give a detailed explanation. While the work may seem trivial and obvious to you, it may not be obvious to someone who's never done it before. Patience and a few extra minutes in the beginning can pay off later when your intern can produce good work independently.
6. ***I want a mentor!*** Make sure that interns have a mentor or supervisor to provide guidance. Make it someone who likes to teach and the experience will be even better.
7. ***A minute of your time.*** The best mentor in the world is useless if he or she can't or won't spend the necessary time mentoring. As newcomers, interns may not speak up if they're feeling ignored, so the burden of making sure they're okay is on the mentor. If the busiest person in the office wants to be the designated mentor, he or she should schedule regular times to meet with the intern.
8. ***Be prepared!*** That wonderful day has arrived and the intern goes to start their internship only to learn that no one knew they were coming and there is no place for them to work.
9. ***Um... I need a chair.*** It is amazing how many employers hire an intern and don't think about the fact that they will need a desk, chair, phone and a computer in order to do the task assigned. It is not fun, and not efficient to move an intern from desk to desk as people are out one day to the next. If you want to get a job done, you need to supply the intern with the tools to do the job.
10. ***Show me the money (as best you can).*** While each intern is different, and each industry has its own personality, remember that interns have expenses. Your organization may not be in a position to pay much, but anything can help. Maybe you can help pay for their parking, take them to lunch every so often, or develop some other creative way to assist them.



## Sample Internship Posting

Free internship postings are available on the Insurance Career Center  
[www.insurancecareercenter.org](http://www.insurancecareercenter.org)

Date: \_\_\_\_\_

Company/agency: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone number: \_\_\_\_\_ E-mail: \_\_\_\_\_

Web site: \_\_\_\_\_

Contact person: \_\_\_\_\_

How to apply: \_\_\_\_\_

Number of openings: \_\_\_\_\_

Internship title: \_\_\_\_\_

Circle one:            paid            unpaid            If paid, list wages: \$

Days and hours: \_\_\_\_\_

Circle all that apply:            U.S. only            F-1 Visa            Permanent Resident

Description: \_\_\_\_\_

---

---

---

---

---

---

---

Qualifications (e.g., preferred major(s), preferred class level, required skills, etc.):

---

---

---

---

---



## **Sample Internship Agreement**

**Note:** *This agreement is intended as an example of what you might see from the academic institution. The agreement will be provided by the institution and the content will vary considerably from institution to institution.*

This Agreement is entered into this \_\_\_\_ day of \_\_\_\_\_, 200\_\_ between the educational institution, and \_\_\_\_\_ (the Experience Provider) located at \_\_\_\_\_.

### **1. INTER-INSTITUTIONAL APPLICATION:**

In order to facilitate internship opportunities among the educational institutions, this Internship Agreement is intended to govern the relationship between the Experience Provider and each educational institution with respect to student interns from any of the educational institutions involved in an internship arrangement with the Experience Provider.

### **2. GENERAL CONSIDERATIONS:**

2.1 An internship is a cooperative program between the educational institutions and approved Experience Providers. The Experience Providers provide supervision, facilities and instruction which help students acquire the skills and knowledge needed in their chosen field of study or occupation.

2.2 This agreement is for the period agreed upon between the Experience Provider and the applicable educational institution.

2.3 This agreement may be terminated by an educational institution or the Experience Provider for good and sufficient cause by providing reasonable advance written notice to the other.

2.4 The educational institutions and the Experience Provider agree to indemnify each other from any claims or liability, including reasonable attorney's fees, due to their respective negligent acts or omissions arising from the performance of this Agreement and to have in effect applicable insurance coverage to adequately underwrite this promise of indemnity.

### **3. THE STUDENT AGREES TO:**

3.1 Comply with the Experience Provider's policies and procedures.



3.2 Comply with the applicable educational institution's dress and grooming standards and honor code.

3.3 Enroll as an academic-internship student and perform the duties indicated unless released by the applicable educational institution and the Experience Provider.

3.4 Report serious problems, including safety and personnel problems, to the Internship Coordinator of the applicable educational institution and the Experience Provider.

3.5 Maintain personal health insurance or student health insurance.

3.6 Execute a separate Student Internship Agreement with the applicable educational institution agreeing to abide by the terms of this Agreement and to perform additional duties and responsibilities as outlined in the Student Internship Agreement.

#### 4. THE EXPERIENCE PROVIDER AGREES TO:

4.1 Designate an individual who will serve as the liaison with the educational institution and the student.

4.2 Involve the student for the entire period of the internship as agreed unless this agreement is terminated for cause (See 2.3 above.)

4.3 Give the student the opportunity to perform a variety of tasks to acquire and practice various skills.

4.4 Orient the student to the Experience Provider's rules, policies, procedures, methods and operations.

4.5 Evaluate the student's performance and notify the applicable educational institution's Internship Coordinator or Internship Office immediately, preferably by phone, of any cause of dissatisfaction with or of misconduct on the part of the student.

4.6 If applicable, pay the student the agreed upon rate of compensation for the term of the internship.

4.7 Provide workers compensation and/or other employment benefits to the student to the extent required by law.

4.8 Accept the primary responsibility for supervision and control of the student at the internship site.



5. EDUCATION INSTITUTION AGREES TO:

5.1 Designate an Internship Coordinator for each internship.

5.2 Ensure the Internship Coordinator contacts the student and Experience Provider, discusses the student's progress, and advises relative to the program of study.

5.3 Ensure the Internship Coordinator strives to promote harmony and cooperation between the Experience Provider, the student and the educational institution.

5.4 Provide liability insurance for the student to cover damage or harm caused by the student in the amount of \$1,000,000 per student, per occurrence, \$3,000,000 in the aggregate, when this agreement is signed and returned to the Academic Internship Office.

6. ENTIRE AGREEMENT:

This agreement constitutes the entire agreement of the parties with respect to the subject matter of this agreement.

The Experience Provider

The Educational Institution

By \_\_\_\_\_ By \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_





## Sample Student Intern Evaluation

Intern name: \_\_\_\_\_

Semester:            Fall                    Spring                    Summer            20\_\_\_\_

Business name: \_\_\_\_\_

Supervisor name: \_\_\_\_\_

Business phone #: \_\_\_\_\_

Please rate the student intern on each of the following categories.

### Professional Qualities:

	Excellent	Good	Fair	Poor	N/A
<b>RATINGS</b>	4	3	2	1	
Establishes rapport with supervisor					
Establishes rapport with staff					
Establishes rapport with clients					
Communicates well					
Seeks new knowledge					
Shows initiative					
Manages time well					
Produces accurate reports/records					
Demonstrates adequate knowledge					

### Personal Qualities:

	Excellent	Good	Fair	Poor	N/A
<b>RATINGS</b>	4	3	2	1	
Is punctual					
Is dependable					
Accepts constructive criticism					
Demonstrates enthusiasm					
Dresses professionally					

I certify that \_\_\_\_\_ (student intern name) has completed \_\_\_\_\_ internship hours.

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Supervisor phone number

\_\_\_\_\_  
Date



# The [INSERT AGENCY NAME HERE] Internship Guide



## Guidebook for Interns

Welcome to [INSERT AGENCY NAME HERE].....	38
What Is an Internship? .....	38
Components of the Internship Program .....	39
Assignment of a Mentor for Each Intern .....	39
Setting Goals for Your Internship.....	39
Meeting with Executives.....	40
Intern Profiles on the Internet .....	40
Group Meetings .....	40
Job Shadowing Opportunities .....	40
Performance Evaluation.....	41
Final Presentation.....	41
Your Evaluation of Us .....	41
Making the Most of Your Internship .....	42
Intern Reference Sheet- Do's and Don'ts on the Job .....	42
Questions, Concerns, Great Ideas to Contribute.....	45
Appendix I: Group Intern Performance Plan and Evaluation.....	46
Appendix II: Profile Information for Intern Internet Site .....	47
Appendix III: Mid-Summer Evaluation of Internship Program by the Intern .....	48
Appendix IV: Final Evaluation of Internship .....	49



## Welcome to [INSERT AGENCY NAME HERE]

We welcome you to [INSERT AGENCY NAME HERE] and hope that your experience here as an intern will be rewarding, both professionally and personally. [INSERT AGENCY NAME HERE] always has recognized that our people are our most important asset—we place great value in each employee’s development. To that end, our goal is to provide you with challenging assignments and opportunities, to develop your skills, to best utilize your talents and energy, to develop strong relationships with you, and to have you remember your internship as a valuable stop on your road to your chosen profession.

### What Is an Internship?

An internship is a meaningful, structured work experience that relates directly to your career interests and goals. It offers opportunities to plan, reflect and shape your career goals.

An internship is a learning/work experience that usually is performed in the summer, but may be done any time of year. An intern may be a high school student, an undergraduate student, or a graduate student actively pursuing a degree.

By participating in an internship, you can enhance the skills you are developing through your academic studies and gain valuable first-hand experience. Beyond obtaining work experience, an internship at [INSERT AGENCY NAME HERE] will provide the opportunity to:

- Gain exposure to a wide variety of occupations;
- Test out your career choices without making a permanent commitment;
- Make valuable contacts with professionals in your field of interest;
- Apply the knowledge you learned in the classroom;
- Develop core skills and personal attributes applicable to your field of interest and to the professional world at large;
- Learn from professionals in the field and develop a network of contacts; and
- Earn money.

Internships should *not* be:

- Unrelated to your career goals;
- Independent of your academic experience; and
- Work you already have been trained to perform.

No matter what your level of education, hours per week worked, or length of service during your time with [INSERT AGENCY NAME HERE], as an intern you’ll be provided with enriching work experience in your job assignments. We also expect that your efforts will contribute to the productivity and output of the department you are working in.



## Components of the Internship Program

### ***Assignment of a Mentor for Each Intern***

You will be assigned a mentor during your internship. The mentor's role will be to help guide you in your chosen field, to assist you in understanding the dynamics of the workplace at [INSERT AGENCY NAME HERE], and to help you in your development activities. Your mentor also may be your supervisor, or it may be someone in the department who is experienced in your field of interest.

The mentor's role is multifaceted. It includes being a coach, teacher and role model. Depending on your work assignments and past experience, you may meet with your mentor daily or weekly, as needed. This should be a mutual decision between you and your mentor. Here are five (5) questions that you could ask your mentor:

1. How did you get to the point that you are in your career today?
2. What obstacles did you encounter on your way to achieving your success and how did you overcome them?
3. What does your typical day look like?
4. What do you see as the trends in your industry?
5. What are the top resources you've turned to for insurance education?

### ***Setting Goals for Your Internship***

Each intern is asked to work with their manager or supervisor to develop 1-3 goals/objectives to accomplish. These goals/objectives should be formally agreed upon and recorded in the Group Intern Performance Plan and Evaluation form on page 13.

Goals/objectives can be project assignments or individual work assignments that you will be performing during your internship. It also can include personal goals not related to a specific task, such as increasing your communication and organizational skills.

This will provide you and your manager with targets to meet during the time that you are here, as well as a mechanism for evaluating your performance and achievements. While these will not be formal evaluations, they will provide feedback to you and are a record that you can share with potential future employers. In addition, it will provide [INSERT AGENCY NAME HERE] with information to help us evaluate how we did in helping you achieve your goals.

The following are good questions to ask your manager or supervisor in setting goals/objectives:

- ❖ What do you want me to learn about the organization?
- ❖ What contributions can I make to current or new projects?



- ❖ What research can I do that will increase my knowledge while supporting the needs of the company?
- ❖ What technology would be a benefit for me to learn?
- ❖ What do you hope I will gain in regard to professional development?
- ❖ Are there manuals or self-study learning materials that would benefit me?

### *Meeting with Executives*

Several meetings will be scheduled to provide you with the opportunity to meet with other executives of [INSERT AGENCY NAME HERE]. You will have the opportunity to hear about their business operations and to learn more about areas of [INSERT AGENCY NAME HERE] outside of the department you are working in. A schedule of these meetings will be provided.

### *Intern Profiles on the Internet (if applicable)*

We are proud of our interns and want the rest of our employees to know who you are. We have a Web page which will have a photo of each of you and information about your school, your career choices, and a little bit of personal information. A profile sheet will be sent to each of you via e-mail to fill out and return.

### *Group Meetings (if applicable)*

We are planning a number of group meetings intended to allow you to get to know each other, to network, to learn more about [INSERT AGENCY NAME HERE], and to discuss topics of interest to you. A schedule of these meetings and their agendas will be coming out shortly.

We'll arrange for you to meet with [INSERT NAME(s)], a former intern(s), now a full time career employee to discuss his/her experience and exchange ideas to enhance your internship.

Possible topics include:

- Best ways to communicate with your supervisor;
- How to assess your progress;
- Giving and getting feedback;
- Successful collaboration in negotiations; and
- Professionalism in the workplace.

### *Job Shadowing Opportunities*

Perhaps you would like to know more about the departments in [INSERT AGENCY NAME HERE] (other than the one you are working in)? Perhaps you would like to learn more about careers outside of your field of study? Or at insurance companies. Please ask and we'll see what arrangements can be made for you to job shadow.



## *Performance Evaluation*

In order for you to get the most out of your internship, your supervisor will provide you with an interim performance appraisal and one at the conclusion of your program. This will allow us to acknowledge your contributions and provide feedback on how you can continue to develop and meet your goals. It also will allow you to leverage the strengths that you have shown and find opportunities to learn and grow in areas where you want to improve. The performance evaluation will be based on the goals/objectives that you and your supervisor set at the beginning of the summer and will be completed on the same form you used to outline your objectives. Unless your school requires an evaluation from your supervisor in order to obtain school credits for your internship, the evaluation will not be shared with anyone but you. We will retain a copy in the agency's personnel files.

We also recommend that you get proactive in obtaining feedback throughout your internship. This does not have to be a formal process. It can be a quick check with your supervisor, your mentor, or your peers. It also can be as simple as asking, "What did I do well? Where could I improve? What would you like me to do next?"

## *Final Presentation (If applicable)*

We have found that the work provided by our interns has been significant and a real contribution to [INSERT AGENCY NAME HERE]. In order to let others know this, and to showcase your talents and what you have accomplished during your internship, we are asking each of you to prepare a brief presentation to share with your department managers and each other at the conclusion of your internship. This should be a brief summary of the work you performed, your achievements, and what you learned from your experiences at [INSERT AGENCY NAME HERE]. If you need help in preparing a presentation, we will be glad to assist you.

## *Your Evaluation of Us*

Your experience at [INSERT AGENCY NAME HERE] and your evaluation of your internship are important to us, as well as to future interns. We will be asking for your evaluation of our internship program at both the midpoint of the summer program and at the conclusion. The evaluation forms you will be sent also are included in this guidebook. Please read them over beforehand, so that you will have the opportunity to reflect on your answers as you go through the program.



## **Making the Most of Your Internship**

Successful interns operate in what is called AIM (active intern mode). This means that they:

- Continually reflect on their needs and goals for the internship;
- Take the initiative to get the most out of all meetings;
- Anticipate the kinds of problems that might occur and work to avoid or surmount these problems by actively seeking help before a situation gets out of control;
- Enthusiastically seek assignments, dig to get the essential information they need, and actively keep their managers informed of progress and problems in a timely manner;
- Seek informal feedback each week or with each task and assignment;
- Regularly contact other people to share experiences and obtain advice about their job and career;
- Help mentors and others where possible; and
- Perform well to gain the most knowledge and skills for their next step and to build a professional network for future opportunities.

## **What You Should and Shouldn't Do On the Job**

- While at work, remember to set your phone to silent or vibrate. Ringtones, obnoxious or not can be a distraction to co-workers.
- Your cell phone is your personal device, but at work you should not be taking personal calls or texts. Emergencies are understood, but idle chit chat is frowned upon.
- Let all calls go to voice mail. It's easier and faster to check a voice mail to gauge if a call is an emergency or not.
- If you need to make a personal call it is advisable to do it during a break and in a private location.
- Do not take your phone to the restroom with you. This practice is an invasion of your co-workers privacy.
- Cell phones are becoming a popular replacement for a watch. While it is important to keep track of your time in meetings, your cell phone can be a temptation/distraction. To avoid this distraction, leave your cell phone at your desk.

### **WARDROBE**

Dress for success. Appearance isn't everything but it does play a contributing role, especially when it comes to first impressions. Internships are the gateway to possible careers and proper dress says a lot about you as an individual.





## **RECOMMENDATIONS**

- Shoes should be close toed
- Skirts and dresses may fall just above the knee. Use the finger length rule high schools use to gauge if the item is appropriate.
- All shirts and tops of dresses must be at least three inches wide; your shoulders should be covered. Spaghetti straps are not appropriate business attire.
- Low necklines and deep V neck tops are discouraged, as well as any items that expose your midriff and lower back.
- Dress slacks are always a good choice. Never wear jeans, spandex or leggings as pants.
- If the office is business casual, golf shirts and polos are typically acceptable.
- Body adornment, such as tattoos and piercings, such as lip or nose rings need to be removed or covered while in the professional environment.

## **MEETINGS**

Meetings are an important time for you to participate, learn and contribute to the organization.

## **RECOMMENDATIONS**

- Remember to bring pen and paper or laptop/tablet to all meetings so you may take notes.
- Be attentive to the presenter.
- Ask questions about things you don't understand or need to clarify. This shows that you are paying attention and are a contributing member.
- Take the initiative to get the most out of meetings.

## **FACEBOOK AND OTHER SOCIAL MEDIA SOURCES**

Social media is a popular means of communication today. Not only are these sources used for high school and college students to interact, but businesses are using social media sources as well. In cases like this, the line may be blurred between business and personal social networking.



## **RECOMMENDATIONS**

- Because social media links employers more closely to employees today, it's important that your personal items, particularly photos or even comments on your Facebook are restricted or in some cases taken down.
- Online games are not an acceptable use of your time interning and are discouraged.
- Reading or viewing relevant posts/articles on Twitter is generally acceptable.
- Time spent on Facebook or other social media sources should be relevant and beneficial in some way to a task at hand.
- As an intern for an agency you do not have the authority to endorse that organization on social media sources.

## **EMAIL/INSTANT MESSAGE**

Email and instant message are popular tools in the business environment that enable employees to exchange information in real time. While most high school and college students are familiar with email and instant message services, these tools must be used in a professional manner when interning with an agency.

## **RECOMMENDATIONS**

- Make sure you use your business email strictly for business. It's not appropriate to send personal emails through your business address. Personal emails need to be done on your own time and should not conflict with work.
- Instant message systems are emerging in business organizations. Remember this is a way for you to quickly answer questions from co-workers, not spend large amounts of time discussing non work related items.
- Never use derogatory language, curse words or slang in business emails or instant message.

## **SHARED CALENDARS**

Mark time away so you can be scheduled into meetings when in the office and others know when you are available to attend meetings where you are needed or if the topic will benefit your internship.

## **BUSINESS PHONE**

Answering the phone and making calls for a business can be an intimidating task for even the most seasoned employees. Time and practice will make this easier, but if you're nervous remember to take a deep breath and follow the suggestions below.



## **RECOMMENDATIONS**

- When answering the phone at an agency always be polite. Greet a caller by saying something to the effect of ...

*“Thank you for calling [NAME OF AGENCY] this is [YOUR NAME] speaking.”*

- Voice mail is also important and is recommended that you reset it each day. Your voice mail should be something to the effect of ...

*“You have reached the voice mailbox of [YOUR NAME] intern for [NAME OF AGENCY]. Today is [DATE], I’m sorry I’m not available to take your call right now; I will get back to you when I return. Have a great day.” OR The week of [MONTH DATE] I’ll be in the office from [TIME to TIME] and will return your call during these hours.*

## **MISCELLANEOUS**

In addition, here are a few more tips to abide by during your internship.

- Make sure to keep your desk clean and put everything away at the end of the day. Not only is this for company security, but it shows respect to your co-workers.
- Greet people in the hall, smile and be friendly.
- Your supervisor is there to help you learn, but they’re not around for you to burden them. Try to think ahead and outside the box of how to solve problems and what you could be doing next.

## **Questions, Concerns, Great Ideas to Contribute**

If you have questions about your internship, need to discuss any concerns, or have a great idea you would like to see implemented in the internship program, please feel free to call us at any time.

Wishing you the very best!

**[INSERT YOUR STAFF LISTINGS HERE]**



# I. Intern Performance Plan and Evaluation

Intern name: \_\_\_\_\_

Position: \_\_\_\_\_

Start date: \_\_\_\_\_ End date: \_\_\_\_\_

Goals/ Objectives	Standard/ Measures	Comments	Weight (must equal 100%)	Rating (1-5)	Weighted Score
1					
2					
3					
<b>Total Score</b>					

Additional manager comments:

Intern comments:

Rating Descriptions	Score
Contributions significantly exceed the stated objective. Results add value beyond the scope of the current role/department, often benefiting the Company, Division and/or Department in a significant way.	5
Contributions exceed the objective. Results add value beyond the scope of the current role, often benefiting the Division and/or Department.	4
Contributions meet the objective. Results create value expected in the current role.	3
Contributions meet some aspects but not all of the objective and performance improvement is necessary.	2
Contributions do not meet the stated objective. Significant improvement is required in order to be successful	1

Employee signature\* \_\_\_\_\_ Date: \_\_\_\_\_

\*Employee signature indicates that they have received a copy of the evaluation.

Manager signature: \_\_\_\_\_ Date: \_\_\_\_\_



## II. Profile Information for Intern Internet Site

We would like to post your picture and a brief biography on our Web site (internal use only). Please fill out the following questionnaire and return it as soon as possible. Thank you.

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

Department you are working in at **[INSERT AGENCY NAME HERE]**:

\_\_\_\_\_

Brief description of your work assignment(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

School and year of graduation: \_\_\_\_\_

Major area of study: \_\_\_\_\_

Previous job experiences or internships: \_\_\_\_\_

\_\_\_\_\_

### **Optional:**

If married, spouse's name: \_\_\_\_\_

If children, their names: \_\_\_\_\_

Hometown: \_\_\_\_\_

Hobbies or interests: \_\_\_\_\_

Last good book read and/or movie seen: \_\_\_\_\_

\_\_\_\_\_

Anything else you would like to add (e.g., special awards, significant life events, words of wisdom, etc.):

---



### III. Mid-Term Evaluation of Internship Program by the Intern

Intern Name (optional)	Department	
Supervisor (optional)	Title	Date

Please evaluate the internship program by using the scale below:

Rating Key:		SD	D	N	A	SA
	My education adequately prepared me for this internship.					
<b>SD:</b> Strongly Disagree	The internship is providing educational value.					
<b>D:</b> Disagree	A detailed description of the internship was given to me at the start of my job.					
<b>N:</b> Neither Agree or Disagree	The experience is closely related to my career goals.					
<b>A:</b> Agree	My supervisor is very receptive to the ideas I express.					
<b>SA:</b> Strongly Agree	I feel as though I am part of the team.					
	My mentor meets with me on a regular basis.					
	I would recommend this internship to a friend.					
	I feel I am making a contribution to the company.					
	Other employees in the company are helpful and support me in the internship program.					
	The Group Intern Meetings added value to my internship experience:					
	Kick-off Luncheon					
	Me Map & Performance Management					
	Challenge Course (Ropes Course)					

Any additional comments you would like to make:



## IV. Final Evaluation of Internship

Name (optional):

Department (optional):

Date:

1. Reflecting back, what do you feel was the best part of your internship?
2. Likewise, what was the least favorite aspect of your internship (even if you did it well)?
3. For the new interns coming next year, what parts of the intern program would you keep the same?
4. What parts of the intern program would you change (add, delete, or improve)?
5. On a scale of one to 10, with 10 being the highest, how would you rate your internship experience at [INSERT AGENCY NAME HERE]?
6. Any other comments you would like to make?

