**SYLLABUS**

**SAN JOSE STATE UNIVERSITY**

**Course:** BUS 227 F- Personal and Business Leadership Skills for Tax Practitioners

Spring 2016

**Instructor:** Prof. Vincent Fong, JD/MBA, CPA

[Ssdmst2016@gmail.com](mailto:Ssdmst2016@gmail.com)

Office Hours: By appointment

Dates: January 30, 2016 to April 1, 2016

Hours: 1/30- 9-5 pm. 2/8-3/28- Mon 6-9 pm

Location: Bunker Hill Campus

Course Description

Learn the intrapersonal and interpersonal skills and knowledge a tax practitioner needs for personal and professional success. Includes listening, oral and written communication, ethical reasoning, relationship and team building, establishment and assessment of accountability measures, time management, and career planning. Pre-Requisite: Graduate Standing

Course Goals and Student Learning Objectives

1. Future expectations for tax professionals
2. Required intrapersonal and interpersonal skills
3. Current assessment of your emotional intelligence and leadership skills
4. Increasing your emotional intelligence skills
5. Increasing your understanding of your personality traits and the personality traits of others
6. Understand how to maximize the leadership skills that you possess now while developing others
7. Increase your professional presence with higher technical skills, communication skills and confidence
8. How to maximize performance of teams
9. How to set the right priorities for you that are consistent with your purposeful life

**Required books for Assessment:**

1. Emotional Intelligence 2.0 by Travis Bradberry (new only for online tests)
2. Strength based Leadership by Tom Rath (new only for online test)

**Required Reading (You will only read half of most books)**

1. The Future of Work by Jacob Morgan
2. The Mindfulness-based Emotional Balance Workbook by Cullen and Pons
3. Springboard by Richard Shell
4. The Truth About Leadership by Kouzes and Posner
5. The Culture Map by Erin Meyer
6. The Enneagram Advantage by Helen Palmer
7. Overcoming the Five Dysfunctions of Teams
8. Bringing Out the Best in Yourself at Work by Ginger Lapid-Bogda
9. Decide by Steve McClatchy
10. Search Inside Yourself by Chade-Meng Tan
11. Robert Waldinger: What makes a good life? Lessons from the longest study on happiness. Use the link below to get the interview. <http://goo.gl/oRVZr5>
12. AICPA Horizon 2025 Core Values and Competencies. You can find the report at <http://goo.gl/KaH86a>

**Grading:**

1. 25% on class participation
2. 25% on quality of homework
3. 25% on evaluation by team members on team project
4. 25% on Integrated Purposeful Life Plan

Pluses and minus grading will be used.

**Sessions:**

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| Session | Topic | Required Reading | Homework | Optional reading |
| Pre |  | The Future of Work, Chapters 1-9  AICPA Horizon 2025 Core Values and  Competencies  Search Inside Yourself, chapters 1-5 | 2 pages biography including why you are taking this course and what you want to learn from this course  Take the online test at the end of Emotional Intelligence 2.0  Take the online test at the end of Strength Based Leadership |  |
| 1 | What will future work, work place and work force look like? What will future leaders have to do to lead?  New organizations  How will these changes impact your definition of meaningful careers consistent with purposeful life?  Neuro-psychological advances  New leadership |  |  |  |
| 2 | Defining purposeful life  Defining meaningful career  What engagement feels like?  Behaviors of future leaders  Gap analysis  Mind/brain optimization  Mindsets  Mindfulness | MBEBW, chapters 1-4  The Truth About Leadership | Your leadership matrix  Practice 1 |  |
| 3 | Relationship  Professional/Executive presence  Integrity  Smart trust | Handouts | Practice 2 |  |
| 4 | Emotional intelligence  Hot spots and blind spots  Enneagram  Values  Happiness  Johari Windows | Handouts  The Enneagram Advantage | Practice 3  Identify the origin of your hot spots and blind spots |  |
| 5 | Cultural and generational intelligence for understanding others  What millennials want | Culture Map, chapter 1-5  Generations at Work, chapters 1-6 | Create your Johari window  Your purposeful life  Practice 4 |  |
| 6 | SSD Communication Cycle  Presentation skills  Minimization and resolving conflicts | Handouts  Bring Out the Best, chapters 1- 4 | Prepare 30 minute presentation  Practice 5 |  |
| 7 | Why teams fail?  Team dynamics  Culturally and emotionally intelligent team  Situational leadership | Overcoming the 5 Dysfunction of Teams, section 1-2  Bring Out the Best, chapter 5 | Your meaningful career with job crafting  Practice 6 |  |
| 8 | Energy and time management  Flow  80/20  Engagement  Leadership matrix | Decide, chapter 1-5 | Integrated Purposeful Life Plan  Practice 7 |  |
| 9 | SMART objectives  Integrated Purposeful Life Plan  Strategic decision making |  | Integrated Purposeful Life Plan  Practice 8 |  |
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**Commitment:** SJSU classes are designed such that in order to be successful, it is expected that students will spend a minimum of forty-five hours for each unit of credit (normally three hours per unit per week), including preparing for class, participating in course activities, completing assignments, and so on. More details about student workload can be found in [University Policy S12-3](http://www.sjsu.edu/senate/docs/S12-3.pdf) at <http://www.sjsu.edu/senate/docs/S12-3.pdf>.

## University Policies

### Academic Integrity

Students should know the University’s Academic Integrity Policy that is available at  
<http://www.sa.sjsu.edu/download/judicial_affairs/Academic_Integrity_Policy_S07-2.pdf>  
Your own commitment to learning, as evidenced by your enrollment at San Jose State University and the University’s integrity policy, require you to be honest in all your academic course work. Faculty members are required to report all infractions to the office of Student Conduct and Ethical Development. The website for Student Conduct and Ethical Development is available at   
<http://www.sa.sjsu.edu/judicial_affairs/index.html>

Instances of academic dishonesty will not be tolerated. Cheating on exams or plagiarism (presenting the work of another as your own, or the use of another person’s ideas without giving proper credit) will result in a failing grade and sanctions by the University. For this class, all assignments are to be completed on your own unless otherwise specified. If you would like to include in your assignment any material you have submitted, or plan to submit for another class, please note that SJSU’s Academic Policy F06-1 requires approval of instructors.

### Campus Policy in Compliance with the American Disabilities Act

If you need course adaptations or accommodations because of a disability, or if you need to make special arrangements in case the building must be evacuated, please make an appointment with me as soon as possible, or see me during office hours. Presidential Directive 97-03 requires that students with disabilities requesting accommodations must register with the DRC (Disability Resource Center) to establish a record of their disability.