

New Course Proposal Template

Steps to the approval process:

1. Complete the applicable template(s) and email them to the departmental or program curriculum committee chair.
2. The curriculum chair emails the proposal to the curriculum committee, then to the department/program faculty for a vote and finally to the department/program chair.
3. The department/program chair emails the proposal to curriculum-approval@iup.edu; this email will also serve as an electronic signature.
4. Curriculum committee staff will log the proposal, forward it to the appropriate dean's office(s) for review within 14 days and post it on the X Drive for review by all IUP faculty and administrators. Following the dean's review the proposal goes to the UWUCC/UWGC and the Senate.
5. Questions? Email curriculum-approval@iup.edu.

Contact Person:	Daniel T. Lawson	Email Address:	dlawson@iup.edu
Proposing Depart/Unit:	Finance and Legal Studies/Eberly College of Business	Phone:	610-357-9774

Course Prefix/Number	See the Registrar's list of Unavailable course numbers at http://www.iup.edu/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=129323 . FIN 365 Student Managed Investment Portfolio 1 – Valuation
Dual/Cross Listed	<i>Dual Listed = Courses listed at two levels, such as undergraduate and graduate, masters and doctoral, etc. Cross Listed = Course has more than one prefix such as GEOG/RGPL 233.</i> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes with: NA
Number of Credits	(UG) Class Hours - 1.5 (UG) Lab Hours - NA Credits - 1.5
Prerequisite(s)	Finance and Accounting majors or instructor permission
Corequisite(s)	<i>This means that another course must be taken in the same semester as the proposed course</i> NA
Additional Information (Check all that apply. Note: Additional documentation will be required)	<input type="checkbox"/> Liberal Studies (please also complete Template C) <input type="checkbox"/> Teacher Education (Is it Step 1 a prerequisite or is it part of the Professional Education Sequence If so please also complete Template D) <input type="checkbox"/> Distance Education (Please also complete Template E)
Course Title	Student Managed Investment Portfolio I - Valuation
Recommended Class Size (optional) (provide justification)	Are you recommending a class size: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes: (check one of the following reasons and provide a narrative explanation) <input checked="" type="checkbox"/> Pedagogical <input type="checkbox"/> Physical limitation of classroom <input type="checkbox"/> Accreditation body standards/recommendations <input type="checkbox"/> Other Explanation (<i>required</i>): Working closely with students who will be writing valuation reports and providing feedback. Additionally, some seats should be reserved for students that have already taken the class for credit but play an integral role in the investment portfolio. This will ensure a smooth transition each year, which is important to the Foundation of IUP (provider of the funds). Moreover, some seats should be left open to allow exceptional freshman and sophomore students the opportunity to be exposed to portfolio investment early in their academic career. Thus, the recommended class size is 25.

Template A

<p>Catalog Description</p>	<p><i>Guidelines: Do not include pre/co-requisite information here. The registrar prefers a concise description of course content, beginning with an active verb.</i></p> <p>This course applies empirical and theoretical concepts to real world portfolio management and investment decisions. Different investment strategies and valuation models are used to reinforce investment principles and practices learned in previous finance courses.</p>														
<p>Student Learning Outcomes</p> <p><i>(These should be measurable, appropriate to the course level, and phrased in terms of student achievement, not instructional or content outcomes)</i></p> <p><i>If dual listed, indicate additional learning objectives for the higher level course.</i></p>	<p>Students will be able to:</p> <ol style="list-style-type: none"> 1. Evaluate fair value of a stock by using multiples, discounted cash flow and capital asset pricing model 2. Construct a diversified portfolio for each sector 3. Valuate performance of a company and of the portfolio 4. Decide whether to invest or not invest into a certain company/sector based on valuations 														
<p>Brief Course Outline:</p> <p><i>Give an outline of sufficient detail to communicate the course content to faculty across campus. It is not necessary to include specific readings, calendar, or assignments.</i></p>	<ol style="list-style-type: none"> A. Introduction, Syllabus, Guidelines for Managing Portfolio B. Portfolio Management Sector/Company Descriptions C. Bloomberg Refresher/Training D. Financial Ratios E. Risk and Reward and Company Financials F. Capital Asset Pricing Model, Leveraged and Unleveraged Betas G. Multiples Valuation; P/E, P/CF, and P/S H. Discounted Cash Flow (DCF) Valuation I. Real Estate Investment Trusts (REITs) and American Deposit Receipts (ADRs) J. Options and Derivatives <p>Evaluation Methods:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding-left: 20px;">Attendance</td> <td style="text-align: right;">15%</td> </tr> <tr> <td style="padding-left: 20px;">Sector updates</td> <td style="text-align: right;">10%</td> </tr> <tr> <td style="padding-left: 20px;">Company Description Assignment</td> <td style="text-align: right;">10%</td> </tr> <tr> <td style="padding-left: 20px;">Financials Report</td> <td style="text-align: right;">20%</td> </tr> <tr> <td style="padding-left: 20px;">Sector Presentation</td> <td style="text-align: right;">20%</td> </tr> <tr> <td style="padding-left: 20px;">Valuation Report</td> <td style="text-align: right;"><u>25%</u></td> </tr> <tr> <td></td> <td style="text-align: right;">100%</td> </tr> </table>	Attendance	15%	Sector updates	10%	Company Description Assignment	10%	Financials Report	20%	Sector Presentation	20%	Valuation Report	<u>25%</u>		100%
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<h3>Rationale for Proposal</h3>															
<p>Why is this course being proposed?</p>	<p>The purpose of this course is to give students hands on experience in portfolio management and valuation of equities. Some of our finance students will end up working in the investment field and their experience in this class will be useful. The Student Managed Investment Portfolio class has been a success for the last two semesters under FIN 481 in terms of investment returns, overall student learning and participation.</p>														
<p>How does it fit into the departmental curriculum? (Check all that apply)</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"><input type="checkbox"/> Major Requirement</td> <td style="width: 33%;"><input type="checkbox"/> Minor Requirement</td> <td style="width: 33%;"><input type="checkbox"/> Core Requirement <i>(Interdisciplinary core – e.g Business/Education)</i></td> </tr> <tr> <td><input checked="" type="checkbox"/> Required Elective</td> <td><input type="checkbox"/> Liberal Studies</td> <td><input checked="" type="checkbox"/> Open Elective</td> </tr> <tr> <td colspan="3"><input type="checkbox"/> Other - NA</td> </tr> </table>	<input type="checkbox"/> Major Requirement	<input type="checkbox"/> Minor Requirement	<input type="checkbox"/> Core Requirement <i>(Interdisciplinary core – e.g Business/Education)</i>	<input checked="" type="checkbox"/> Required Elective	<input type="checkbox"/> Liberal Studies	<input checked="" type="checkbox"/> Open Elective	<input type="checkbox"/> Other - NA							
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<p>Is a similar class offered in other departments?</p>	<p><input type="checkbox"/> Yes Please provide comment: NA</p>														

Template A

	<input checked="" type="checkbox"/> No
Does it serve the college/university above and beyond the role it serves in the department?	<input type="checkbox"/> Yes Please provide comment: NA <input checked="" type="checkbox"/> No
Who is the target audience for the course?	<input checked="" type="checkbox"/> Course Designed for Majors (<input type="checkbox"/> Required <input checked="" type="checkbox"/> Not Required) <input checked="" type="checkbox"/> Course Designed for Minor <input checked="" type="checkbox"/> Departmental Elective <input type="checkbox"/> Restricted to Majors/Minors <input type="checkbox"/> Open to Any Student <input type="checkbox"/> Liberal Studies <input type="checkbox"/> Other - NA
Implications for other departments	A. What are the implications for other departments (<i>For example: overlap of content with other disciplines, requirements for other programs</i>)? There is no overlap amongst other disciplines or programs. B. How have you addressed this with other department(s) involved? What was the outcome of that attempt? (Attach documents as appropriate) NA
For Dean's Review	
<ul style="list-style-type: none"> • Are resources available/sufficient for this course? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA • Is the proposal congruent with college mission? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA • Has the proposer attempted to resolve potential conflicts with other academic units? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> NA 	
Comments: Click here to enter text.	